

# **Culture: The New Key Terrain**

## **Integrating Cultural Competence into JIPB**

**A Monograph  
by  
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**AY 05-06**

<b>REPORT DOCUMENTATION PAGE</b>				<i>Form Approved</i> <i>OMS No. 0704-0188</i>		
<p>The public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.</p>						
1. REPORT DATE (DD-MM-YYYY) <b>25-05-2006</b>		2. REPORT TYPE <b>MONOGRAPH</b>		3. DATES COVERED (From - To) <b>SEPT 2005-MAR 2006</b>		
4. TITLE AND SUBTITLE <b>Culture: The Key Terrain Integrating Cultural Competence Into JIPB</b>				5a. CONTRACT NUMBER		
				5b. GRANT NUMBER		
				5c. PROGRAM ELEMENT NUMBER		
				5d. PROJECT NUMBER		
6. AUTHOR(S) <b>Major O. Kent Strader</b>				5e. TASK NUMBER		
				5f. WORK UNIT NUMBER		
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) <b>School of Advanced Military Studies 250 Gibbon Ave Ft. Leavenworth, KS 66027</b>				8. PERFORMING ORGANIZATION REPORT NUMBER		
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES) <b>Command and General Staff College 1 Reynolds Ave Ft. Leavenworth, KS 66027</b>				10. SPONSOR/MONITOR'S ACRONYM(S) <b>CGSC, SAMS</b>		
				11. SPONSOR/MONITOR'S REPORT NUMBER(S)		
12. DISTRIBUTION/AVAILABILITY STATEMENT <b>APPROVED FOR PUBLIC RELEASE; DISTRIBUTION IS UNLIMITED</b>						
13. SUPPLEMENTARY NOTES						
14. ABSTRACT <p>This monograph suggests that it maybe possible to weaponize culture, specifically through the use of cultural intelligence. In order to weaponize culture, commanders and staffs must develop competence culturally to leverage the key relationships, dependencies and vulnerabilities. Competence is "the fusion of cultural understanding with cultural intelligence that allows focused insight into current operations." Finally, the purpose of this monograph is to convince operational leaders that a systems approach to culture is the best method of deduction to achieve cultural competence.</p> <p>The framework this monograph employees includes international relations, history, theory and an analysis of current doctrine. After establishing why culture has become they new key terrain this monograph suggests modification to the Joint Intelligence Preparation of the Battlefield process and ways to incorporate cultural competence into campaign design using a systems approach to culture.</p>						
15. SUBJECT TERMS <b>Culture, Cultural Competence, Cultural Intelligence, Commander's Critical Cultural Intelligence Requirements, Critical Cultural Factors, Weaponized Culture</b>						
16. SECURITY CLASSIFICATION OF:			17 LIMITATION OF ABSTRACT	18. NUMBER OF PAGES	19a. NAME OF RESPONSIBLE PERSON	
REPORT (U)	b. ABSTRACT (U)	c. THIS PAGE (U)	(U)	74	19B. TELEPHONE NUMBER (Include area code) (913) 758-3300	

# **SCHOOL OF ADVANCED MILITARY STUDIES**

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## Abstract

Culture the New Key Terrain: Integrating Cultural Competence into JIPB by Major O. Kent Strader, U.S. Army, 56 pages.

The purpose of this monograph is to provide operational commanders and staff with a glimpse of the potential of non-lethal power of culture. This monograph suggests that it may be possible to weaponize culture, specifically through the use of cultural intelligence. In order to weaponize culture, commanders and staffs must develop competence culturally to leverage the key relationships, dependencies and vulnerabilities. Competence is “the fusion of cultural understanding with cultural intelligence that allows focused insight into current operations.” Finally, the purpose of this monograph is to convince operational leaders that a systems approach to culture is the best method of deduction to achieve cultural competence.

The framework this monograph employs includes international relations, history, theory and an analysis of current doctrine. After establishing why culture has become the new key terrain this monograph suggests modification to the Joint Intelligence Preparation of the Battlefield process and ways to incorporate cultural competence into campaign design using a systems approach to culture.

The first half of this monograph makes the case for a “new world order” that demands operational commanders and staff view the world as a complex, globalized, interconnected place. Second, it defines the three terms that are used extensively, namely, culture, cultural competence and cultural intelligence. Third, it consults military theory to examine how it has dealt with culture. There is a clear conceptual transition at this point from which the author describes how the phenomenon of culture has become a dominant aspect of war in the late twentieth century. Given this fact, and the apparent need to understand US military culture in relation to all the actors, allies, neutrals, adversaries and local population, this monograph suggests a framework for analytically and rationally comparing all the actor’s cultures to one another. It then suggests a systems approach is the best way to deconstruct each actor’s culture to determine the key relationships, dependencies and vulnerabilities. Finally, this monograph suggests the Joint Intelligence Preparation of the Battlefield is the best place to integrate culture into campaign design and suggests changes to the JIPB framework to incorporate culture.

The findings of this monograph suggest that cultures are complex systems that are best deconstructed by employing a systems approach and that a systems approach is the best method of incorporating culture into the current campaign design framework. The most important finding of this monograph is suggested in the title, culture is the new key terrain and to weaponize or integrate it into JIPB commanders and planners must be culturally competent.

In conclusion, there is much work that remains to be done in this field. This monograph has suggested areas to expand this topic. Two areas for future research include: Construction of a methodology for unraveling the key leverage points in a culture and practical ways to weaponize cultures’ non-lethal advantages. In a world of globalized, up-to-the-minute media, and systemic interconnectedness, it is more vital than ever planners supply commanders non-kinetic options that can leverage cultures’ *critical factors* to coerce, deter, deny and prevent future conflict before servicemen and women are committed into harm’s way.

## Acknowledgments

I would be remiss if I did not begin by thanking my LORD Jesus Christ who created me for his good pleasure and given me the capacity for thought, creativity, and inspiration, which is all designed that I might enjoy HIM. “Blessed be the LORD my strength, which teacheth my hands to war, and my fingers to fight: my goodness, my fortress; my higher tower, and my deliverer; my shield, and HE in whom I trust.” The Psalms of King David 144: 1-2

In 2003 I was assigned to the Office of the Program Manager, Saudi Arabia National Guard (OPM-SANG) as the Western Sector Division Operations & Intelligence Advisor and Brigade Advisor to the Khalifa Omar bin Khattab Brigade in Taif, Saudi Arabia. The relevant information in this job title is the location. Previously, I had never even been to the Middle East, let alone thought much about its culture and people. So it was an even greater surprise when I attended the advisors course taught by the JFK Special Warfare Center at Fort Bragg, that I did not receive anything substantial regarding culture. Certainly, force protection, evasive driving and other basic survival skills were taught, but not culture. Later, when I arrived in Riyadh for my orientation to OPM-SANG I thought I would be immersed in culture training. I will admit, I did receive survival training, but nothing that would prepare me to negotiate, leverage, exploit culture or discern my hosts cultural language.

Subsequently, I spent a year experimenting, making mistakes and learning by experience. Experience is said to be the best teacher, but within my cultural context, I certainly could have been better served. However, it was my day-to-day experience, the television images of Operation Iraqi Freedom and my counterparts piercing questions that caused me to realize the US could no longer plead ignorance culturally. Colin Powell told President Bush in the run up to OIF: “If we break it, we’ll have to fix it”. To fix it, implies engagement with the population, the government, the opposition, the religious actors, the political actors, the tribes, the media and all the Non-governmental and Intergovernmental Organizations and our Coalition partners. Additionally, OIF introduced a level of cognitive tension internationally and regionally in the cultural dimension that will never diminish. Rather, it will increase. All this taken together contributed to this monograph.

As such, I would be remiss if I did not thank Mister Ghazi al-Hargan my Interpreter/Translator, Major General (Retired) Ahmed al-Behiery the Western Sector Advisory Team (WSAT) Senior I/T for guiding me through all of the cultural pitfalls and teaching me their culture. I would like to thank my counterparts, many of them have moved on to positions of greater responsibility, for their patience and instruction. I would like to thank my dear friend Major Alex Freeman of the British Military Mission and my friends at the United States Consulate in Jeddah for the stimulating conversations that informed by frequent myopic opinions.

Finally and most importantly, I would like to thank my wife Amanda for her patience, love, understanding and sacrifice, losing countless days and nights together as I read, analyzed, synthesized, structured and eventually wrote this monograph. Your support and encouragement throughout this process and our eighteen year of marriage has been immeasurable. To Dr. Alice Bulter-Smith, my Monograph Director, mentor and friend: thank you for guiding me through this process which gave substance to this monograph. In conclusion, I would like to thank the Army for providing this course and the faculty. This has been the most rewarding year of my Army career. The totality of this monograph are my own thoughts, all errors within are the responsibility of the author alone.

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## CHANGES IN THE OPERATIONAL ENVIRONMENT

**“Another aspect of readiness for expeditionary operations is awareness of other cultures and languages. We are expanding our investments in training and education programs to enhance language training and cultural orientation in service schools. We are also placing greater emphasis in these areas at our Combat Training Centers, evidenced in both design of training rotations and scenarios for role players. Leaders must continue to stress cultural awareness during pre-deployment training, leader development, and in other initiatives.”**

**General Peter J. Schoomaker, CSA<sup>1</sup>**

In a letter dated October 23, 2003, Missouri Congressman Ike Skelton penned the subsequent impassioned words to Secretary of Defense Donald Rumsfeld: “...if we had better understood the Iraqi culture and mindset, our war plans would have been even better than they were, [and] the plan for the post-war period and all of its challenges would have been far better...we must improve our cultural awareness...to inform the policy process. Our policies would benefit from this not only in Iraq, but...elsewhere, where we will have long-term strategic relationships and potential military challenges for many years to come.”<sup>2</sup> Now, two years later, Congressman Skelton’s words seem even more prophetic. Protracted asymmetric conflict, opponents who negate our colossal strength, the political nature of the conflict, and limited national will makes the search for a “silver bullet” priority one. Which is why, now more than ever a framework for integrating culture into the operational planning process is required.

Knowledge of the enemy is a fundamental truism of warfare. However, there is an appreciable gap between understanding our enemies and being able to leverage knowledge of their culture to our advantage. At the operational level identifying and exploiting cultural tensions remains an emergent field of study. Furthermore, cultural intelligence is neither an

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<sup>1</sup> Peter J. Schoomaker, *Our Army at War—Ready and Relevant...Today and Tomorrow: A Game Plan for Advancing Army Objectives in FY 05 and Beyond: Thinking Strategically*, (Washington: GPO, 2004), 15.

<sup>2</sup> William Wunderle, *Through the Lens of Cultural Awareness: Planning Requirements in Wielding the Instruments of National Power*. (Santa Monica, CA: RAND Corporation, 2005), 1.



accepted intelligence discipline, nor an accepted doctrinal term. Taking the discussion one step further, no appreciable level of expertise is required of planners who conduct cultural analysis at the operational level of war. Finally, no accepted method of integrating culture into the planning process has currently been adopted. Theoretically, using Congressman Skelton's assessment, spanning the cultural intelligence gap can mitigate operational surprises. Therefore, the problem this monograph will address is the operational aspect of the problem Congressman Skelton identified. Particularly, how do operational planners integrate culture into the intelligence process and what level of fidelity is necessary to reveal cultural levers?

This monograph is less an empirical study of culture, than a reflective essay that attempts to establish where the discussion currently stands, and what remains to be explored. Nevertheless, it will provide some substantive recommendations. This exposition will use five key questions or subjects to reveal the current state and recommend a future state for culture in operational planning. First, it will provide definitions of the terms culture, cultural competence and cultural intelligence. Next, it will explore the historical context for cultural competence and cultural intelligence at the operational level of war. Third, what preexisting frameworks best elucidate for the commander the cultural contrasts? Fourth, how does a systems approach help planners and commanders integrate cultural competence into J/IPB? Finally, what must the tools look like in order to develop a systems approach to J/IPB?

Joint doctrine, as currently written, provides an incomplete assessment of the human dimension of the joint battlespace. Therefore, it is important to review existing doctrine. Step two of the Joint Intelligence Preparation of the Battlespace (JIPB) process, "Describe the Battlespace Effects", expresses the battlespace environment in terms of battlespace dimensions. Joint Publication 2-01.3, *Joint Tactics, Techniques and Procedures for Joint Intelligence Preparation of the Battlespace*, states the human dimension "may require greater or lesser

analysis depending on the relative geographical complexity of the region.”<sup>3</sup> Furthermore, the Joint Publication states: “The human dimension consists of various militarily significant sociological, cultural, demographic and psychological characteristics of the friendly and adversary populace and leadership.”<sup>4</sup> The missing ingredients are the other actors within the human dimension of the battlespace and ways to analyze, assess and determine the levers within their cultures. As such, this monograph will focus on culture, or the human dimension, and what level of fidelity must be achieved when planners analyze culture. It will suggest best practices for integrating culture into the JIPB process. And finally, it will take a new look at the undiscovered potential to leverage culture.

A subtle shift in the nature of military conflict took place at the end of the Cold War that first went completely unnoticed by the majority of Washington policy makers. In his book, *The Pentagon’s New Map*, Thomas Barnett suggests the Department of Defense was searching for a grand strategy to replace the Cold War policy of containment.<sup>5</sup> First Somalia, then Haiti, followed in rapid succession by Bosnia and a few years later Kosovo, and now Afghanistan and Iraq. These crises’ were coined “Military Operations Other Than War” (MOOTW). Policy makers and senior military leaders were loath to become bogged down in the business of nation building, due to the indeterminable timeline associated with nation building. In addition to the indeterminate factor, the aforementioned conflicts had an ethnic dimension that required US servicemen and women to analyze and synthesize the complex cultural dynamic in contact, without proper training or education.

Marine Brigadier General Anthony Zinni observed in 1993: “What above all made Somalia a tough place to do business was the United States lack of comprehension of its intricate

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<sup>3</sup> US Chairman of Joint Chiefs of Staff, Joint Publication 2-01.3, *Joint Tactics, Techniques and Procedures for Joint Intelligence Preparation of the Battlespace*. (Norfolk, VA: USJFCOM, 2000), II-9.

<sup>4</sup> USCJCS, JP 2-01.3, II-37.

<sup>5</sup> Thomas P. M. Barnett, *The Pentagon’s New Map: War and Peace in the Twenty-First Century*. (New York: Berkley Books, 2004), 1-2.

and unfamiliar social and cultural fabric.”<sup>6</sup> This theme was repeated in Haiti, Bosnia and Kosovo. Why suddenly had culture become a new dynamic of late 20<sup>th</sup> century warfare? Samuel P. Huntington identified this phenomenon in his now famous book *The Clash of Civilizations*. Huntington asserts the post-Cold War years radically altered what had been a bifurcated world along cultural lines. Furthermore, Huntington foretold: “Culture and cultural identities, which at the broadest level are civilization identities, are shaping the patterns of cohesion, disintegration and conflict in the post-Cold War world.”<sup>7</sup> But culture is not the only driving force behind the chaos and complexity of the late 20<sup>th</sup> and early 21<sup>st</sup> century. The interconnectedness of the global market place has drastically influenced causality.

Globalization, according to Meghan O’Sullivan, author of *Shrewd Sanctions* and Special Assistant to the President and Deputy National Security Counsel (NSC) Advisor on Iraq and Afghanistan, is “the rapid movement of ideas, people, resources, and goods across boundaries and barriers.”<sup>8</sup> *Glasnost* or *Perestroika* opened up new markets for trade between East and West. Openness and free trade, meant dependency on the Far East and West, to assist fragile democracies economically, as they developed a market-based economy. The crash of the Thai Bhat in 1997, recounts Thomas Friedman in his book *The Lexus and the Olive Tree*, set in motion a chain of economic events that placed Southeast Asia into recession and toppled Russia’s slithering economy. The “Asian flu” ultimately caused a recession that resulted in the US Dow Jones Industrial market taking a 554 point dive and suspension of trading on the floor, something that had not happened since “The Great 1929 Crash”. What Friedman suggests is the post-Cold War era is one of global interdependency and connectedness. Globalization, Friedman submits,

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<sup>6</sup> Robert F. Baumann and Lawrence A. Yates, “My Clan against the World”: *US and Coalition Forces in Somalia, 1992-1994*. (Fort Leavenworth, KS: Combat Studies Institute Press, 2004), 5.

<sup>7</sup> Samuel P. Huntington, *Clash of Civilizations and the New World Order*. (New York: Simon & Schuster, 1996), 19-20.

<sup>8</sup> Meghan O’Sullivan, *Shrewd Sanctions: Statecraft and State Sponsors of Terrorism* (Washington: Brookings Institute Press, 2003), 1,2.

illustrates the interconnectedness of “everyone’s domestic politics, commerce, environment and international relations.”<sup>9</sup> And, oh yes, culture.

Diametrically opposed, East and West, Salifist and Secularist, are currently engaged in a battle to promote their vision of the world. At a more rudimentary level, the conflict is a result of cultures which have not “fully broken from their primordial identities”, despite living in modern nation-states.<sup>10</sup> These conflicts maybe religiously, ideologically or ethnically motivated, regardless, they are conflicts that demand international attention. Barnett identifies the primordial cultures and their associated regions as part of the “Non-integrating Gap”. The “Non-integrating Gap” is countries or areas that do not accept globalization as the “new world order”.<sup>11</sup> One thing most foreign policy wonks can agree on is the necessity to engage these cultures before they become complex problems. The complex nature of “non-integrated gap” cultures is attributed to the interconnectedness of the “new world order

The complexity and interconnectedness of the globalized system, claims *Complexity* author Mitchell Waldrop, makes it necessary to “look at the world as a strongly interconnected system.”<sup>12</sup> Nonlinearity, complexity and *the edge of chaos* are conceptual means scientist employ to describe the post-modern world. In this complex world various actors interact within this system and one another. In order to understand the interaction between systems and actors it is necessary to break them down into their essential elements. The US military elucidates the interconnectedness of the globalized system with a framework of six basic subsystems: political, military, economic, **social**, infrastructure and informational (PMESII) systems. These systems cultivate the military planners understanding of adversaries and allies alike, creating a holistic system of systems approach. A System of Systems Analysis (SoSA) discloses key relationships,

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<sup>9</sup> Thomas L. Friedman, *The Lexus and the Olive Tree*. (New York: Farrar Straus Giroux, 2000), xi-xix.

<sup>10</sup> Thomas L. Friedman, *From Beirut to Jerusalem*, (New York: Anchor Books, 1995), 91.

<sup>11</sup> Barnett, *The Pentagon’s New Map*, 8.

<sup>12</sup> M. Mitchell Waldrop, *Complexity: The Emerging Science at the Edge of Order and Chaos*. (New York: Simon & Schuster, 1992), 351.

dependencies and vulnerabilities, leverage points to influence, capabilities, perceptions, decision-making and/or behavior.<sup>13</sup> Identifying the links or tensions within a system is fundamental to understand how to affect a particular system, within a military campaign.

To resolve conflicts of culture it is necessary to understand the origin of the tensions between affected parties, which requires a depth of understanding that goes well beyond showing the bottoms of ones feet, not eating with ones left hand or asking about a Muslim man's wife. Joint planners must recommend solutions to complex cultural problems, with a level of competence PMESII experts at the Standing Joint Force Headquarters (SJFHQ) are advertised to possess. Furthermore, it is necessary to identify where culture will be integrated and into what process(es)? If Red, Green and Blue Teaming is employed, which presently appears to be the most likely solution, how will culture be integrated? If Stability & Reconstruction Operations (SRO) is expected to be the US military's future then campaign planners must determine how culture can be integrated into campaign planning. These two questions are addressed in a limited fashion within the breadth of this monograph; in as much, they represent areas for further research.

In his monograph *The New Craft of Intelligence: Achieving Asymmetric Advantage in the of Nontraditional Threats*, published by Strategic Studies Institute "Studies in Asymmetry", Bob Steele, a retired Marine intelligence officer, suggests the US military faces not only a new threat paradigm, but also a new intelligence paradigm. The old paradigm of the Cold War relied exclusively on high technical intelligence collection assets such as spy satellites, spy planes, and electronic eavesdropping capabilities. While the new threat and new intelligence paradigm places high demand on low cost, human intelligence capability, demanding in Steele's words a "new

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<sup>13</sup> Jeremy Biggie, "Operational Net Assessment" (Norfolk, VA: USJFCOM J9, 2003); accessed at [http://www.mors.org/meetings/decision\\_aids/da\\_pres/Biggie.pdf](http://www.mors.org/meetings/decision_aids/da_pres/Biggie.pdf).

craft of intelligence”.<sup>14</sup> This author will suggest that new craft is cultural intelligence.

Geographical isolation and a half century of hegemony have done nothing to increase American’s understanding of other cultures. Therefore we are at a distinct disadvantage in the post-Cold War world. A disadvantage we can only overcome with focused and decided cultural study.

If the reader can agree that future conflict will take place along cultural divides, then it is advisable for the US military to formally incorporate culture into JIPB.<sup>15</sup> As such, the purpose of this monograph is to explicate why operational planners must strive to achieve cultural competence and integration of culture into campaign planning. The reason for this phenomenon is **culture has become the new key terrain in the post-Cold War era, which demands a systems approach to analyze and integrate culture into the Joint Task Force (JTF) Commander’s campaign planning process.** To better understand how the human dimension has become a critical component of the battlespace environment this monograph will employ a framework of five key questions or statements.

Section two will define pertinent terms and examine how military theory has viewed culture in warfare. Before understanding another culture it is important to understand ones own culture and cultural biases. In addition to cultural self-awareness, section three will investigate cultural models that can assist in understanding ourselves in relation to all the various actors. Finally, section three will conclude with an understanding of stereotypical cultural styles and the nature of cultural conflict. Section four will analyze the emergence of culture across the broad spectrum of U.S. military operations in the past ten years and how it has impacted operational planning. Section five will seek to clarify how emerging military theory provides a conceptual framework for understanding, analyzing culture and suggest ways to apply these theories to the

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<sup>14</sup> Bob Steele, *The New Craft of Intelligence: Achieving Asymmetric Advantage in the of Nontraditional Threats* (Carlisle, PA: Strategic Studies Institute, 2002), v,vi.

<sup>15</sup> Huntington, *Clash of Civilizations*, 20.

campaign design process. Finally, section six will summarize and provide recommendations for integrating culture into JIPB.

## **Summary**

In conclusion, the nature of future conflicts demands a broader and much deeper level of cultural understanding, referred to throughout this exposition as cultural competence. Culture itself is only one component, albeit an extraordinarily important one, operational planners should concentrate on as they translate national strategic objectives into operational means: to persuade the members of the “non-integrating gap” elites, moderates and fence-sitters to integrate with the rest of the globalized world. To persuade moderates and fence-sitters, planners must create messages that communicate US objectives within the associated actor’s cultural context. To effect or influence the human dimension is it necessary to develop an agreed upon definition, determine if and how culture and military theory intersection and understand the shortcoming in current doctrine germane to culture and cultural intelligence. These topics will be analyzed in the subsequent section.

## **DEFINITIONS, THEORY & HISTORY**

This section will recommend new terms of reference that should be incorporated into the Department of Defense (DoD) lexicon and subsequently frame them in the context of military theory and history. It will accomplish this by defining the terms culture, cultural competence and cultural intelligence. Furthermore it will establish a historical context for cultural competence and cultural intelligence at the operational level of war. But first it will establish a new military definition for culture. It is important to note, the terms cultural competence and cultural intelligence are not currently recognized in the military lexicon. Culture is the only term that does appear in common usage, however the definition found in the Joint Publication 1-02, Dictionary of Military and Associated Terms reflects a meaning that is irrelevant to the modern

context. The reader should take note the terms culture, cultural competence and cultural intelligence will reoccur throughout this discourse.

## **DEFINITIONS—Culture, Cultural Competence and Cultural Intelligence**

“The Latin root *colere* (to inhabit, to cultivate, or to honor), generally refers to patterns of human activity and the symbolic structures that give such activity significance”.<sup>16</sup> Compare the definition above to that assigned by Joint Publication 1-02, which defines culture as “a feature of the terrain that has been constructed by man.”<sup>17</sup> What both the Joint Publication and the Latin root agree on is commonly referred to in academic circles as Cultural Landscape, which consists of topography, vegetation, structures and settlement patterns. Neither of these definitions is adequate for our contemporary understanding of culture. It is important to determine exactly what kind of culture we mean. Definitions include such broad areas as the arts, personal behavior, a biological material or soil preparation. The definition of culture germane to this monograph is expressed as common values, beliefs, shared attitudes and practices particular to a nation or people group. Culture then, according to Ingolf Vogeler of the University of Wisconsin Eau Claire, consists of six dimensions. “Cultures are specific, located in space, purposeful, rule-following, rule-making, communicating and interacting with people.”<sup>18</sup> These characteristics are derived from the study of humankind, otherwise known as Anthropology.

Anthropologist study, among other things, human culture. Anthropologists are not the only academics that study human culture. Students of International Affairs and those with particular emphasis in geographical studies of certain regions find culture particularly intriguing, such as Fawaz Gerges. Gerges, in his book *America and Political Islam: Clash of Cultures or*

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<sup>16</sup> Wikipedia, “Culture”, accessed at <http://en.wikipedia.org/wiki/Culture>.

<sup>17</sup> US Chairman of Joint Chiefs of Staff, Joint Publication 1-02, Department of Defense Dictionary of Military and Associated Terms. (Norfolk, VA: USJFCOM, 2005), 137.

<sup>18</sup> Ingolf Vogeler, “Definitions: Culture, Cultural Geography and Cultural Landscape”, accessed at <http://www.uwec.edu/Geography/Ivogeler/w188/define.htm>.



*Clash of Interest?* defines culture as “historically, transmitted patterns of meanings and symbols and a set of shaped values, beliefs, attitudes, modes of living, and customs ”.<sup>19</sup> Compare Gerges’ definition with Harvard’s chair of International and Area Studies, Samuel P. Huntington. Huntington defines culture as the “values, norms, institutions, and modes of thinking to which successive generations in a given society attached primary importance.”<sup>20</sup> Therefore, the working definition this monograph will employ for culture is the values, beliefs, norms and institutions which transmit patterns of meaning, modes of living and customs within a given society.

A simple comparison of Huntington’s and Gerges’ definitions reveals that values are the central element in any culture. Values are commonly accepted standards to which an individual or group ascribe. However, values are expressed in many different ways, such as religion, ideology or familial association, to name a few. For instance, a Bedouin may express his religious values by his conformity to the five pillars of Islam. Similarly, he may express his ideological values through support of a political or religious affiliation. Neither however is more important than his tribal values, which on a hierarchical scale rank first among his allegiances. From this example we can surmise Bedouins first and foremost place family as the highest value and therefore the individual is devalued in Arab culture. Therefore, individual cultures rank order values in a hierarchical fashion and being able to understand this hierarchy is representative of cultural competence. In order to understand the complex nature of various cultures, US military senior leaders and planners must achieve mastery in order to operationally leverage culture.

## **CULTURAL COMPETENCE**

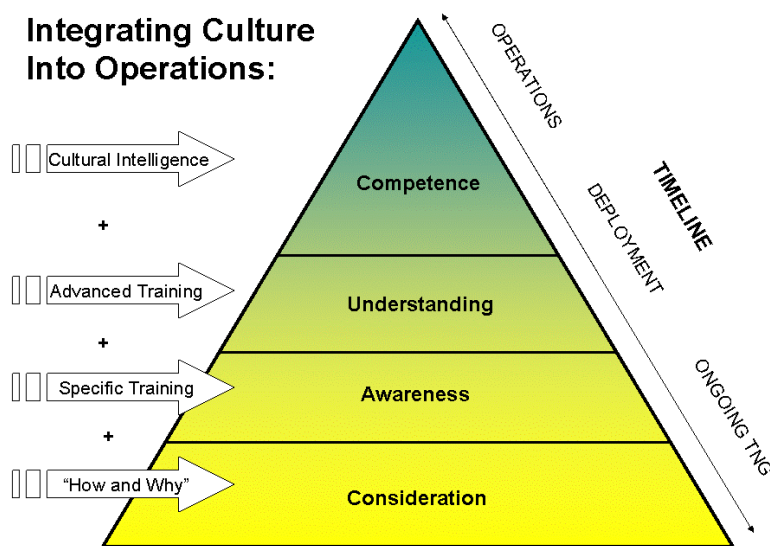
Cultural understanding, one competence of cultural understanding, has several levels. Levels of cultural understanding are hierarchical in nature. Figure 1 illustrates a framework for

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<sup>19</sup> Fawaz A. Gerges, *America and Political Islam: Clash of Cultures or Clash of Interests?* (Cambridge: Cambridge University Press, 1999), 6.

<sup>20</sup> Huntington, *Clash of Civilizations*, 41.

understanding the relationship between levels of cultural understanding. Figure 1 *Integrating Culture Into Operations* was created by Lieutenant Colonel William Wunderle, an Army Research Fellow at the RAND Corporation. Wunderle's framework rank orders cultural understanding, competence being the highest level of understanding with consideration being the lowest. LTC Wunderle's defines cultural competence as "the fusion of cultural understanding with cultural intelligence that allows focused insight into current operations." Furthermore, "cultural competence infers insight into intentions of specific actors and groups."<sup>21</sup> Cultural competence as a term of reference did not originate with the military. The medical, education and business profession were the first to incorporate this term of reference into their professional lexicon. Its intended use was to identify and assist professional bridge the gap between themselves and their staffs and the economically indigent, illegal aliens and non-native speaking Americans they treated, taught or with which they transacted business.



**Figure 1-Wunderle's Integrating Culture into Operations Model<sup>22</sup>**

<sup>21</sup> Ibid, 9.

<sup>22</sup> Wunderle, Through the Lens of Cultural Awareness, 9.

Militarily, cultural competence is required at the operational level of war in order to conclude a specific state actor or group's intentions. This, however, is nothing new. Take for instance the extensive study made by the United States and its European allies during the Cold War of the former Soviet Union. As professional military officers we were inculcated with the military culture of their Soviet counterparts. Every officer could recite from rote memory the components of a Motorized Rifle Regiment. How it would fight, whether it be in the offense, the defense or a movement to contact. This is representative of cultural competence, and it is the type of competence necessary to prosecute the Global War on Terror (GWOT). Unlike the Cold War, the GWOT will not have templates that can be laid over a piece of terrain that describes the adversaries' disposition, composition, strength and capabilities. Instead the planners challenge will be to describe the adversaries' capabilities in asymmetric terms.

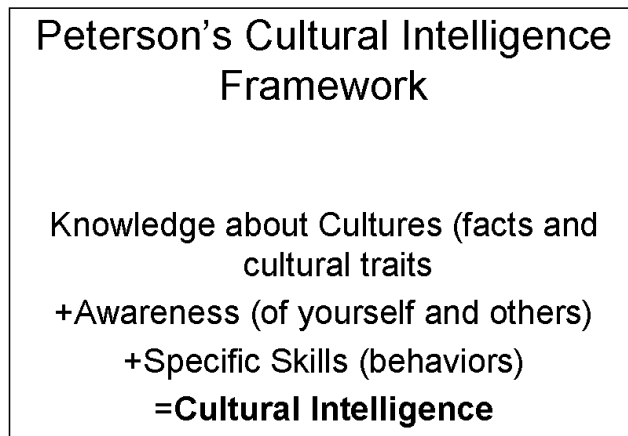
What Army officers understood about our Soviet adversary was not just tactical intelligence or human intelligence, it was cultural intelligence. Cultural intelligence taught us how the Soviets thought and made decisions. At strategic and operational levels this aspect of intelligence and its vulnerability to exploitation was understood, even if it was not defined as such.

## **CULTURAL INTELLIGENCE**

Much the same way that cultural competence is yet to be accepted as a term of reference in the DoD lexicon, cultural intelligence is just the same. Like cultural competence, cultural intelligence too is derived from the world of business and commerce. The term cultural intelligence is particularly prevalent in international business literature. One example is Across Cultures president Brook Peterson's book, *Cultural Intelligence: A Guide to Work with People from Other Culture*. In the international business world, cultural intelligence allows businessmen to bridge the cultural divide between themselves and their international clients to communicate

effectively on a cognitive, physical and emotional level. The objective of cultural intelligence is to conduct a successful business transaction. In the military sense, cultural intelligence has a similar objective: to aid commanders and planners in analyzing the key relationships, dependencies and vulnerabilities, leverage points to influence, capabilities, perceptions, decision-making and/or behavior within a limited geographical area and cultural context. Peterson's framework is a starting point for assessing cultural actors (See Figure 2). His framework consists of three aspects: knowledge, awareness and skills.

Knowledge and awareness suggest cognition, and knowledge and awareness with experience supply skill. Thus we can see these three characteristics accumulate, and therefore complement one another. Skills are developed by acquiring the requisite knowledge and ability to perceive the nuances of culture. These abilities do not develop overnight; rather they come from study and interaction. They are the "sum total of the motives, traits, beliefs, and values shared by the plurality of a national population", claims Raphael Patai in his seminal work *The Arab Mind*.<sup>23</sup>



**Figure 2-Brooks Peterson's Cultural Intelligence Framework<sup>24</sup>**

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<sup>23</sup> Raphael Patai, *The Arab Mind* (New York: Hatherleigh Press, 2002), 19.

<sup>24</sup> Brooks Peterson, *Cultural Intelligence: A Guide to Working with People from Other Cultures* (Saint Paul, MN: Intercultural Press, 2004), 178.

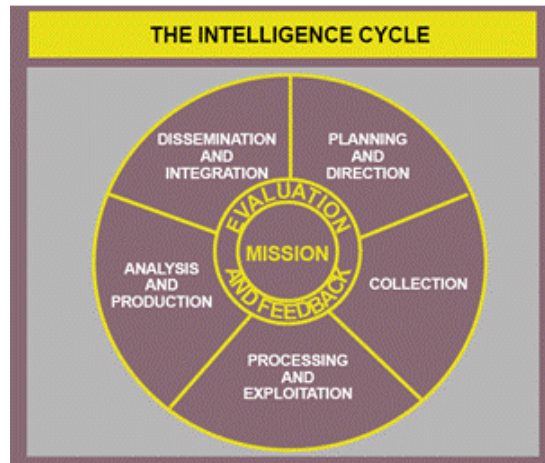
Lieutenant Commander John Coles defines cultural intelligence in his article *Cultural Intelligence & Joint Intelligence Doctrine* as “an analysis of social, political, economic, and other demographic information that provides understanding of a people or nation’s history, institutions, psychology, beliefs (such as religion), and behaviors.” Furthermore, he asserts “it helps provide understanding as to why a people act as they do and how they think. Cultural intelligence provides a baseline for designing successful strategies to interact with foreign peoples whether they are neutrals, people of an occupied territory, or enemies.”<sup>25</sup> Cultural intelligence has moved in the post-Cold War era from the arena of states and nation-states to non-nation-state actors, tribal and sectarian factions.

The impetus for cultural intelligence emerged, according to the late Admiral Arthur Cebrowski, because “the locus of violence has moved over the years from the global great power war venue down through smaller states and sub-states constructs to individuals.”<sup>26</sup> This assertion is substantiated by historical precedence. The reader will recall in 1993 Mohammad Farah Aideed, a clan warlord, was the locus of violence in Somalia. It was Slobadan Milosevik in the Balkans. And it is now Osama bin Laden and Abu Musab al-Zarqawi in Afghanistan and Iraq. These men are surrounded by clans, tribes and/or networks of terrorists that the US and its coalition partners must deconstruct and link together by affiliation using knowledge, an acute sense of awareness and skill. The relevant question is what framework can operational commanders and planners apply to collect cultural intelligence within the Joint Intelligence Cycle? Given the definitions of cultural competence and cultural intelligence the Intelligence Cycle appears inadequate to the task. A new construct is needed to elucidate the “new world order”. But first we must establish a working definition for cultural intelligence.

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<sup>25</sup> John P. Coles, *Cultural Intelligence & Joint Intelligence Doctrine*, Joint Operations Review, (2005), 3.

<sup>26</sup> Megan Scully, ‘*Social Intel*’ *New Tool For U.S. Military*, Defense News, (April 2004), 21.



**Figure 3-The Joint Intelligence Cycle<sup>27</sup>**

The Department of Defense Dictionary of Military Terms defines intelligence as “the product resulting from the collection, processing, integration, analysis, evaluation, and interpretation of available information concerning foreign countries or areas. Information and knowledge about an adversary obtained through observation, investigation, analysis, or understanding.”<sup>28</sup> If culture then is the values, beliefs, attitudes, mode of thinking and customs of a people or nations, cultural intelligence is the collection, processing, integration, analysis, evaluation and interpretation of those values, beliefs, attitudes, modes of thinking and customs of a particular people or state. Furthermore, the objective of cultural intelligence is to understand why a group of actors act and think as they do and develop a baseline for designing successful strategies to leverage their culture in support of the military end state. Intuitively, human intelligence (HUMINT) is the best possible means to collect on culture.

Human intelligence is defined as “a category of intelligence derived from information collected and provided by human sources”, according to the DoD dictionary. Human sources also known as human resource intelligence are “derived from the intelligence collection discipline that

<sup>27</sup> US Chairman of Joint Chiefs of Staff, Joint Publication 2-0, *Doctrine for Intelligence Support of Joint Operations* (Norfolk, VA: USJFCOM, 2000), II-1.

<sup>28</sup> US Chairman Joint Chiefs of Staff, “DoD Dictionary of Military Term”, accessed at <http://www.dtic.mil/doctrine/jel/doddict/data/i/02695.html>.

uses human beings as both sources and collectors, and where the human being is the primary collection instrument.”<sup>29</sup> If cultural intelligence is derived from knowledge, awareness and skill it requires interaction. Interaction means human contact. Therefore, human intelligence is collected by means of reconnaissance and surveillance (R&S). Cultural intelligence is therefore a sub-discipline of human intelligence and cannot be collected by technical means, which is why it is a component of the HUMINT discipline. Nevertheless, it is by means of the intelligence process that cultural indicators are collected, processed and exploited, analyzed and integrated. Furthermore, they become *critical cultural factors* that are vital to campaign design and attainment of the desired military end state, which will be explored later in this exposition.

In summary, culture describes the values, beliefs, attitudes and modes of thinking of a people or nation. Cultural competence is the fusion of cultural understanding with cultural intelligence. And finally, cultural intelligence applies “The Intelligence Process” to culture through the lens of cultural understanding with the expected outcome it will disclose key relationships, dependencies and vulnerabilities, leverage points to influence, capabilities, perceptions, decision-making and/or behavior. When did culture become part of warfare? In the subsequent section we will examine culture's role in military theory. It is not obvious at first, but rather subtle. However, culture does appear in the literature of some of the great theorists.

## THEORY

### Clausewitz—The Heart and Temper of a Nation

The Napoleonic War changed the scope and scale of warfare forever. Not only did it introduce *levee en mass*, new organizations, different strategies and changes in the nature of command and control, it also introduced guerrilla warfare. The venerable Carl von Clausewitz

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<sup>29</sup> USCJCS “DoD Dictionary”, Human Intelligence, <http://www.dtic.mil/doctrine/jel/doddict/data/i/02695.html>.

describes this change in Chapter Seventeen, “The Character of Contemporary Warfare”, in *On War*. “All these cases”, Clausewitz speaking of the Peninsular War and Napoleon’s invasion of Russia, “have shown what an enormous contribution the heart and temper of a nation can make to the sum total of its politics, war potential, and fighting resources, we cannot expect them to remain unused in the future whether the war is fought in self-defense or in order to satisfy intense ambition.”<sup>30</sup> A vivid example of Clausewitz assertion is found in the pages of David Chandler’s *The Campaigns of Napoleon*, wherein he describes Napoleon’s complete underestimation of the Spanish people. “Napoleon’s policy in Spain proved one his greatest blunders. He never appreciated how independent the Spanish people were of their government; he misjudged the extent of their pride, of the tenacity of their religious faith, of their loyalty to Ferdinand. He anticipated that they would accept the change of regime without demur; instead he soon found himself with a war of truly national proportions on his hands.”<sup>31</sup>

Within three weeks of Napoleon’s occupation of Spain, French officials were assassinated and the Spanish peasantry had armed themselves for a guerrilla conflict of epic proportions, which ultimately cost Napoleon a quarter million men.<sup>32</sup> History repeated itself in Napoleon’s advance and retreat from Moscow. People’s war or guerrilla war, as characterized by the Spanish rebellion, was the result of Napoleon’s failure to factor in the human terrain. Meticulous to a fault, Napoleon always reconnoitered the terrain, the government, the armed forces and all domains relevant strategically—save the people. What Clausewitz teaches us is the “heart and temper of a nation” is an essential part of strategic and operational planning. Clearly, what Clausewitz meant was the values, beliefs, attitudes and modes of thinking, alas, culture. However, Clausewitz was not the only observer of the Napoleonic era to observe this phenomenon.

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<sup>30</sup> Carl von Clausewitz, *On War* (New York: Alfred A. Knopf, 1993), 258.

<sup>31</sup> David G. Chandler, *The Campaigns of Napoleon* (New York: Scribner, 1966), 608, 610.

<sup>32</sup> Chandler, *The Campaigns of Napoleon*, 611.



## Jomini—Passions of the People

J.D. Hittle in his introduction to Baron Antoine Henri Jomini's *Art of War*, asserts Jomini lamented the advent of a "new kind of war in which the people of a nation as well as the soldiers were participants, a war in which self-destruction was preferable to capitulation." Nevertheless Jomini understood total war involved more than military forces. "War is a great drama", he says, "in which a thousand physical and moral causes operate more or less powerfully, and which cannot be reduced to mathematical calculation." These forces, Jomini forewarns, "include the passions of the people to be fought...their financial resources, the attachment they bear to their government or their institutions...and, finally, the resources and obstacles of every kind likely to be met."<sup>33</sup> Jomini, unlike Clausewitz, had learned firsthand through painful experience the price of miscalculating the people. As theoreticians Clausewitz and Jomini provide no reference specific to culture. What they do provide is a glimpse into the future, warning us of the brutality and unorthodox nature of irregular war, fought almost exclusively over modes of thinking and living.

Nationalism was a relatively new phenomenon when Clausewitz and Jomini were attempting to synthesize their experience. Nationalism matured and spread across Europe and the remote corners of the globe. Eventually, it spread to the Middle East at the close of the 19<sup>th</sup> Century, fanned into flame by Ottoman Turk excesses. By the time the First World War erupted Arab nationalistic aspirations were ready to be realized. King Hussein, the Hashemite ruler of the Hejaz (modern day western Saudi Arabia), seeing how disenfranchised Arabs by Atta Turk and his Young Turks, he attempted to solidify his hold on Arabia, Syria and Iraq rally by invoking the Mohammedan Caliphate with military assistance from the British. Enter T.E. Lawrence—an Arabist, who when war broke out in Europe was participating in an archeological dig in northern

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<sup>33</sup> Antoine Henri Jomini, in "The Art of War" with an introduction by J.D. Hittle, *Roots of Strategy Book 2* (Mechanicsburg, PA: Stackpole Books, 1998), 428, 437, 447.

Iraq. Lawrence, alias, Lawrence of Arabia, leveraged Hussein's Arab tribesman's superior knowledge of the desert, range, rapidity of movement and individual warfighting skills to pin down Turkish troops and secure the eastern flank of Sir General Edmund Allenby, British commander in Palestine.

### **T.E. Lawrence—Master Key of Opinion...the Common Language**

Major T.E. Lawrence, in his seminal work, *The Seven Pillars of Wisdom* paints a clearer picture of culture's role in irregular warfare. Before his fabled, camel-laden assault on Akaba, Lawrence of necessity took an accurate measure of the tribes and their allegiances. Again, before mounting the final assault on Damascus he took measure of the willingness of the peoples of Syria to support the Arab Revolt and entertained means to motivate them to join the effort. Lawrence had the benefit of knowing the Arab language and put it to good use, maintaining unity of effort and warding off tribal intrigue and fighting. Finally, he managed to maintain the support of his counterpart, Faisal, demonstrating an eloquent mastery of Arabic when attempting to persuade or negotiate with his host. Arabic is a verbose language, very expressive. Lawrence understood this and masterfully exploited every ounce of value from his knowledge and mastery of the language, the land, the people, their religion, history and psychology. But most important, he understood which questions to ask.

Lawrence effectively combined the independence of the Bedouin fighter, the “master-key of opinion...the common language”; Syria's ripeness for revolt, autonomy and their susceptibility to Feisal “pretending to revive the glories of Ommayad or Ayubid” (former Sunni Moslem Caliphates).<sup>34</sup> Furthermore, Lawrence determined the political heart of Syria was the Hauran region, which joined Palestine and Syria. He recounts: “In view of the new importance of Hauran, there was need for us to learn its dialect, the construction and jealousies of its clan-

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<sup>34</sup> T.E. Lawrence, *The Seven Pillars of Wisdom* (London: Penguin Books, 2000), 344, 345.

framework, and its names and roads”. And so in preparation for the Syrian campaign, Lawrence first set off to disrupt the Damascus-Tabuk section of the Hejaz Railway. He took along three Arabs from the Hauran region. “These three fellows, Rahail, Assaf and Hemeid would teach me their home-affairs imperceptibly, as we rode on business, chatting.”<sup>35</sup> Lawrence’s understanding of cultural intelligence contributed significantly to Alleby’s victory because Lawrence knew which questions to ask.

Lawrence’s inquisitive nature helped him understand better than any other Arab advisors the fighting capabilities of his allies, the various aspects of the operating environment, the capabilities and limitations of his foe, and how best to combine those elements into a cogent strategy that supported British operations in Palestine and Arab aspirations for post-war independence. The tactics he employed were a subset of his cultural understanding of the capabilities and limitations of his allies. The synthesis of Lawrence’s experience was his arcane ability to manipulate Arab cultural into tactical and operational success. He leveraged the confidence of Feisal and his chieftains: a confidence that resulted from years of regional study, travel, mastery of the language and living in intimate conditions with the tribal leadership and their followers. His experiences are a salient model for modern practitioners of cultural competence.

It is important to note here, some authors believe Lawrence’s work was perhaps more allegory than truth. There is strong debate whether he fabricated the events. Nevertheless, whether truth or yarn, it provides a template for cultural competence.

## **Summary**

Taken together, Carl von Clausewitz, Baron Antoine Henri Jomini and T.E. Lawrence, are representative of the changes in modern warfare between the Napoleonic era and the closing

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<sup>35</sup> Lawrence, *The Seven Pillars of Wisdom*, 352.

saga of the First World War. Clausewitz and Jomini identified the change, while Lawrence exploited the change. As we shall see, people's war and cultural intelligence are closely linked historically. Had Napoleon, who was a rabid consumer of intelligence, understood what nationalistic passions he generated in the Spanish and Russian people, he most certainly would not have annexed Spain or invaded Russia. This thesis, arguably revisionist, may never be answered, but has contemporary application. While theory provides a way of approaching culture, modern history reveals the emergence and reasons for cultures contemporary importance.

## HISTORY

**“If you don't understand the cultures you are involved in; who makes the decisions in these societies; how their infrastructure is designed; the uniqueness of their values and in their taboos—you are not going to be successful.”**

**George Wilson, JP 3.06 Doctrine for Joint Urban Operations<sup>36</sup>**

Military history is the means by which historians analyze and synthesize the accounts of past armed conflict for immutable lesson that can be applied to modern warfare. As such, the post-Cold War era maybe too fresh for any substantive synthesis until it has properly aged. Nevertheless, it is beneficial to explore what changes were exerted on the era politically and militarily and how these events have affected current events. The social dimension of warfare in the late twentieth century, barely perceptible at first, raised “a host of social, economic, political and moral challenges to the world's nations”. These words taken directly from the 1991 Quadrennial Defense Review broadly identify the nature of the emerging challenges. In the subsequent section we will discover how the social or cultural dimension evolved from a non-essential planning consideration to become key terrain.

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<sup>36</sup> US Chairman of Joint Chiefs of Staff, Joint Publication 3.06 *Doctrine for Joint Urban Operations* (Washington: GPO, 2002), IV-1.

## A New Era Dawns

Soviet reformer Mikhail Gorbachev relinquished the nuclear codes to President Boris Yeltsin, ending global bifurcation and ushering in a new era of American-Russian relations. Generals Norman Schwarzkopf and Colin Powell masterfully orchestrated a one hundred hour ground campaign that ejected Saddam Hussein's invading army from Kuwait. Despite these foreign policy successes, domestic issues and the health of the US economy ultimately terminated the first President Bush's reelection bid. Pulitzer Prize Winner and best selling author, David Halberstram's analogy of Winston Churchill's political demise is instructive. "The British had believed that Churchill's primary passion was defense and foreign policy, not domestic affairs, they wanted someone who they thought would pay more attention to their postwar needs."<sup>37</sup> Prospects for a time of peace and prosperity demanded a political alteration, someone whose agenda justifiably focused more on domestic concerns and cashed in on the peace dividend.

In the wake of the Cold War, a sense of euphoria developed that mushroomed into a ground swell of Wilsonian and Hamiltonian idealism. Idealism is a theory of international relations that asserts direct knowledge of subjective images. Walter Russell Mead, Senior Fellow for US Foreign Policy on the Council of Foreign Relations and author of *Special Providence* offers the following definition of these foreign policy positions. Hamiltonians "regard a strong alliance between the national government and big business as the key both to domestic stability and to effective action abroad, and they have long focused on the nation's need to be integrated into the global economy on favorable terms". Wilsonians "believe that the United States has both a moral obligation and an important national interest in spreading American democratic and

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<sup>37</sup> David Halberstram, *War in Time of Peace*, (New York: Simon & Schuster, 2001), 17.

social values throughout the world, creating a peaceful international community that accepts the rule of law”.<sup>38</sup>

The new Clinton administration espoused a Wilsonian idealism in their foreign policy, coupled with a Hamiltonian fiscal responsibility to the US economy in the global marketplace, on terms favorable to the United States. The Clinton White House viewed the 1990s as a chance to welcome in a “democratic spring”, inspired by the demise of Communism and globalization. This democratic spring entailed a sevenfold program according to Halberstram. Assist the USSR and its “satellites toward full, stable democracy”. End Communist domination of the Asian continent and encourage substantive democratic reform. Third, “consolidate the shift in Latin America away from military regimes and toward at least formal democracy” and deepen regional commitments to democratic institutions. Fourth, end apartheid in South Africa and sponsor a multiethnic, multiparty democracy. Furthermore, Clinton era Wilsonians wanted to reinforce the World Court and the United Nations, by putting an end to regimes that violated human rights and reinforce Non-governmental Organizations (NGOs). And finally, champion global women’s suffrage.<sup>39</sup>

In spite of his post-Cold War policies, foreign affairs dictated a much different agenda to the Clinton White House that would demand a new understanding of culture. As such, this section will examine how the post-Cold War history has underscored the human dimension in joint warfare. In Somalia, clan warfare defined the human dimension, while in Haiti the human dimension was threefold—racial, class and political divisions; in Bosnia religious and ethnic divisions erupted into genocide and ethnic cleansing—the same holding true for Kosovo. In the post-Cold War era, United States Army historians first began cataloged the impact of culture on warfare during Operation RESTORE HOPE, in the wake of the Battle of Mogadishu in October

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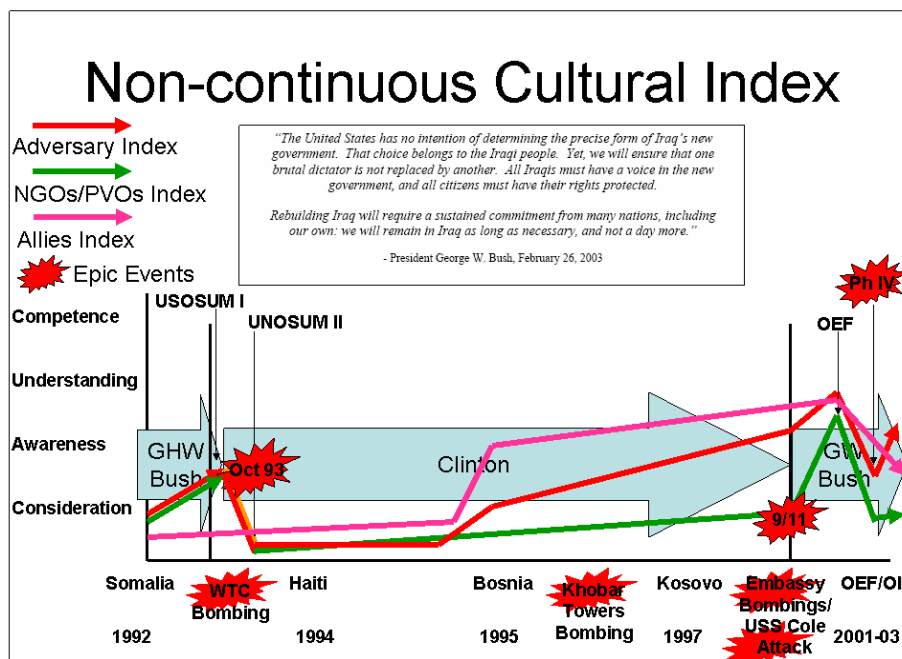
<sup>38</sup> Walter Russell Mead, *Special Providence: American Foreign Policy and How It Changed the World* (New York: Routledge Taylor & Francis Group, 2002), 3.

<sup>39</sup> Mead, *Special Providence*, 283, 284.

1993. This section will examine the mounting, and at times, non-continuous influence culture has placed on campaign design. Finally, this section will trace the conflicts that heralded a systemic change in the nature of 21<sup>st</sup> Century warfare. In summation, what emerges is a pattern of increased cultural sensitivity, albeit non-continuous, which has greatly influenced the importance of the cultural dimension in operational planning.

If we were to attempt to trace the cultural dimensions influence on a continuum, beginning with the end of the Cold War, the index would climb but appear non-continuous. This is because there are actually three breaks in the continuum, which coincide with the three administrations that have presided over foreign policy since the end of the Cold War. The combination of differences in foreign policy and the unanticipated events that shaped administrations, tended to fragment the continuum. For instance, President George H.W. Bush was adamantly against committing US troops to peacekeeping and nation-building, while President Clinton made it an extension of his foreign policy. Figure 4 representing the author's framework of the Non-continuous Cultural Index applied to a time continuum. The decline in cultural sensitivity along the continuum represents significant foreign policy events that retarded the US cultural index. The reader should bear in mind cultural sensitivity is viewed from multiple perspectives as presented in Figure 4 by the various international actors.

John Lynn, author of *Battle: A History of Combat and Culture* delivered a lecture in 2004 at the Fort Leavenworth's, Combat Studies Institute entitled *What War Should Be, What War Really Is*. His comments attempted to synthesize the waning years of the 20<sup>th</sup> Century and frame the future of warfare.



**Figure 4-Non Continuous Cultural Index (Created by Author)**

“Turning battlefield victory into political success at the start of the 21<sup>st</sup> Century will require us to re-examine the very nature of war itself in an age of globalization, Islamic extremism, and terrorism. The American military is apt to search for technological solutions to the challenges before it. Certainly, weaponry, vehicles, aircraft and other tools of war matter a great deal; however, such hardware is ultimately less fundamental today than is the “software” of thought. Soldiers often say that an army fights the way it trains, which is true, but it also trains the way it thinks. Preparation begins with conception.”<sup>40</sup>

Lynn suggests the future of war will be nothing like it was before. Rather, it will be asymmetric in nature—wars of ideology and values. The enemies of the West will continue to negate the US technological advantages, choosing complex terrain rather than frontal assaults. This will require soldiers and their leaders to think differently about application of firepower, maneuver, information, deception, force protection and of course culture. The thesis of *Battle: A History of Combat and Culture* proposes that different cultures have different ideas about war, which frames the way they fight; subsequently, their different lens shape their “evolving realities

<sup>40</sup> Brian M. De Toy, ed., *Turning Victory into Success: Military Operations After the Campaign*, “What War Should Be, What War Really Is” by John A. Lynn (Fort Leavenworth, KS: Combat Studies Institute Press, 2004), 43.



of conflict’’.<sup>41</sup> Therefore, it will be incumbent on commanders to unravel the cause of conflict and attack its origins with non-kinetic tools and to a lesser degree its soldiers. Certainly the peacekeeping and peace enforcement campaigns of the post-Cold War era are representative of this phenomenon.

The period 1991 to 2001 is important because the US Army underwrote a role it never felt comfortable with—pacification and peacekeeping—and a host of associated tasks at the lower end of the spectrum of war. This shift is attributed to the Clinton administration’s Wilsonian approach to foreign policy. Reflecting the ideas of Kant and Woodrow Wilson, President Clinton embarked on an ambitious reformation of US foreign policy.

“In 1996, the Office of the President of the United States issued a National Security Strategy entitled *Engagement and Enlargement*. The plan’s three main ideas [were] the promotion of democracy abroad, the maintenance of a combat-ready military to meet the myriad of the nation’s needs, and to improve America’s economy through international trade. The foreign policy in this strategy [reflected] Wilson’s ideals when it states “Democratic states are less likely to threaten our (U.S.) interests”, and “Democracies create free markets that offer economic opportunity, make for more reliable trading partners, and are less likely to wage war on each other’.”<sup>42</sup>

These policies were a reflection of the new administrations first blush in the post-Cold War era. Somalia was the new administrations first opportunity to further its untested foreign policy.

## **Somalia**

In the spirit of his National Security Strategy, President Clinton committed US servicemen and women to Somalia in 1992 to support United Nations humanitarian relief operations, under mounting international pressure to put an end to the images of war ravaged, starving people, caught in the midst of a clan war. The deployment of the 1<sup>st</sup> Marine Expeditionary Force, the US Army 10<sup>th</sup> Mountain Division and Navy SEALs is well documented, as is their logistical and security support role. Not until those tragic days in October 1993, when

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<sup>41</sup> De Toy, *Victory into Success: Military Operations After the Campaign*, 43.

<sup>42</sup> Kevin J. Cole, *Air & Space Power Chronicle*, “The Wilsonian Model of Foreign Policy & The Post Cold War World (Maxwell AFB, AL: Air University Press, 1999), 25.

eighteen elite troopers lost their lives and more than twice that number were injured, did it become apparent that what had been labeled a simple mission was indeed very complex. The virtual naiveté, explains Mark Bowden in *Black Hawk Down*, ended the Western powers illusion which “felt they could sweep venal dictators and vicious tribal violence from the planet as easily and relatively bloodlessly as Saddam Hussein had been swept from Kuwait.”<sup>43</sup>

At the operational level US commanders assigned to UN Operation in Somalia (UNOSUM) I appreciated the complexity of the Somalia’s clan warfare. However, during UNOSUM II “US leaders failed to take certain factors of Somali culture into consideration, contributing to the operation’s failure”.<sup>44</sup> The success of the 1<sup>st</sup> MEF during UNOSUM I was the result of “continuous monitoring of the local population’s disposition and the adversaries intentions”, according to Joint Publication 3-06. Furthermore, Versalle Washington in the opening chapter of *“My Clan Against the World”: US and Coalition Forces in Somalia 1992-1994* illustrates this point.

“When US troops embarked on Operation RESTORE HOPE, they set off on what many believed to be a relatively simple mission. The troops would find a country different from many they had seen, with rules and customs they did not understand, a climate that made even routine operations difficult, and a people who, while needing their assistance, did not necessarily appreciate the requirement. This combination of circumstances was not what the American forces anticipated and would cause a chain of events that would see President Bill Clinton withdraw from the American commitment.”<sup>45</sup>

Somewhere in the transfer of authority (TOA) between UNOSUM I and II knowledge was lost or ignored. Unfortunately, observed UNOSUM II planners: “It was surprising how little we really knew” about many issues they found to be crucial.<sup>46</sup> What UNOSUM II failed to capitalize on was the Herculean efforts of the Civil-Military Operations Center, which had

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<sup>43</sup> Mark Bowden, *Black Hawk Down: A Story of Modern War* (New York: Penguin Books, Ltd., 2000), 334.

<sup>44</sup> US Chairman of Joint Chiefs of Staff, Joint Publication 3-06, *Doctrine for Joint Urban Operations* (Washington: GPO, 2004), III-10.

<sup>45</sup> Robert F. Baumann, Lawrence A. Yates with Versalle F. Washington, *“My Clan Against the World”: US and Coalition Forces in Somalia 1992-1994* (Fort Leavenworth, KS: CSI Press, 2004), 9.

<sup>46</sup> Ibid, 25.

“served as a clearinghouse for information”.<sup>47</sup> Additionally, there cultural misperception resulted in the Somali police force established under UNOSOM I being marginalized and their political leaders and decision-makers ostracized. Finally, the command underestimated the adversary’s military capability, failing to “uncover the fact that many militia officers had extensive training from the Soviet military academy in Odessa and from Italian military schools”.<sup>48</sup> Cultural intelligence was the critical component. “The problem, as several participants and observers noted, was that few commanders, staff officers or troops entering the country were comfortable or conversant with the cultural dimension of military operations”.<sup>49</sup> Unfortunately, this trend continued for the foreseeable future.

## Haiti

Operation UPHOLD DEMOCRACY resembled operations in Somalia culturally. The United States involvement in Haiti’s affairs date back to the 1890s, up through the mid-1930s; a period commonly referred to as the “Banana Wars”. During that time the Haitian people had come to perceive the United States as “the fatherly protectors of a juvenile Haitian society.”<sup>50</sup> United States military intervention in Haitian affairs in 1994 came in response to a moral and humanitarian crisis and the need to restore the duly elected representative of the people. From the outset of the operation, Haitian perception of the US was of a fatherly protectorate. Ironically, the Joint Task Force (JTF) failed to capitalize on Haitian good will. Members of the JTF chose to distance themselves from the intellectuals and elites who had a vested interest in democratic reform. In *Invasion, Intervention, “Intervasion”: A History of the U.S. Army in Operation Uphold Democracy* Kretchik, Baumann and Fishel submit: “Uphold Democracy introduced U.S.

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<sup>47</sup> USCJCS, Joint Publication 3-06, III-10.

<sup>48</sup> Ibid, III-11.

<sup>49</sup> Bauman, Yates, and Washington, “*My Clan Against the World*” , 209.

<sup>50</sup> Walter E. Kretchik, Robert F. Baumann and John T. Fishel, *Invasion, Intervention, “Intervasion”: A History of the U.S. Army in Operation Uphold Democracy* (Fort Leavenworth, KS: CSI Press, 1998), 183.

forces into a culture vastly different than their own. Yet, in planning for the Haiti operation, the Army, in general, had little appreciation of Haitian history and culture.”<sup>51</sup> Prophetically, the study revealed: “Knowledge of how a people think and act, and how they react to military intervention arguably becomes paramount.”<sup>52</sup>

Operation UPHOLD DEMOCRACY achieved the political endstate—General Cedras was removed from power, his thugs were disbanded, power was returned to the democratically elected leader and a new Haitian police force was installed that respected human rights. Strategically this translated into a stable environment which no longer posed a threat to US illegal immigration, nor Haiti’s neighbors. However, the inability of the planners to operationalize the President’s strategic vision into tactical guidance failed to bring about systemic change, nor promote the White House’s Wilsonian ideals. Nevertheless, the opportunity to operationalize democratic values presented itself again in Bosnia just a few months later. Only this time the operation was not just joint, but coalition as well.

## **Bosnia**

The term Balkans is a Turkish word for mountainous region. Because of the compartmentalized nature of the Balkan terrain and the constant stream of invasions, the ethnic diversity of the region was a diffuse array of people groups. Further complicating the dynamics of the region, the Balkans was the confluence of three of the world’s major religions—Christianity, Russian Orthodoxy and Islam. Enflamed violent sectarian rhetoric and a century’s old conflict perpetuated by myth and lore, alienated ethnic Bosnians and Serbs. An international outcry was responsible for increased pressure on the European Community (EC) and the United States to stop the blood shed. Milosevic’s previous attempts to forcibly prevent Slovenia’s separation from Yugoslavia were repulsed militarily, as were his attempt to filch parts of Croatia.

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<sup>51</sup> Kretchik, Baumann and Fishel, *Invasion, Intervention, “Intervasion”*, 188.

<sup>52</sup> *Ibid*, 188.

A United Nations protection force known as UNPROFOR was dispatched by the European Community (EC), while a settlement was brokered between Zagreb and Belgrade.<sup>53</sup>

In April 1992 both Serbs and Croats attempted to annex large portions of Bosnia-Herzegovina by targeted terror acts to encourage ethnic resettlement and creation of “homogeneous areas”.<sup>54</sup> Intervention by UNPROFOR proved inadequate as a result of unrealistic rules of engagement (ROE). Subsequently, ethnic cleansing and resettlement continued unabated until late 1995. The West’ admitted diplomatic failure and international pressure forced them to resort to military action to end the bloodshed and bring the warring factions to the peace table. The Dayton Peace Accords effectively ended the violence, but committed US forces to the region as part of a multi-national peacekeeping force for the next nine year.

Operationally, Bosnia proved more complex than either Somalia or Haiti. Being in Europe’s back yard, the North Atlantic Treaty Organization (NATO) felt it should have the lead in Operation JOINT ENDEAVOR. However, the months preceding Dayton had generated a perception of EC incompetence, coupled with US unwillingness to subordinate itself to NATO. In the end, sectors were largely divided among the major coalition actors. In order to achieve coalition synchronicity, understanding the individual NATO countries political and military culture became a central variable in cultural understanding. In addition to allies, operational commanders and planners confronted Non-governmental Organizations (NGOs) and Intergovernmental Organization (IO) cultures. Unfortunately, the parochial ambitions of NGOs and IOs, adversely affected the commands attempts to garner participation through the Joint Civil-Military Cooperation Centers (JCMCC).<sup>55</sup> Compared to Somalia, the relationship between

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<sup>53</sup> Robert F. Baumann, George W. Gawrych and Walter E. Kretchik, *Armed Peacekeepers in Bosnia* (Fort Leavenworth, KS: CSI Press, 2004), 26-27.

<sup>54</sup> Baumann, Gawrych and Kretchik, *Armed Peacekeepers in Bosnia*, 27.

<sup>55</sup> Ibid, 194, 195.

NGOs and the military was strained. Finally and most importantly, operational commanders and planners confronted three distinct cultures: Serbian, Bosniac and Croatian.

In summation, the lack of enthusiasm militarily for nation-building, coupled with a force protection posture that many times alienated the soldiers from the people, created unnecessary friction. Consequently, crafting a culturally palatable message, building an effective civil-military rapport with NGOs and IOs and developing relationships with the local population were major operational shortcomings culturally. Operationally, many of these shortcomings were overcome incrementally, but certainly not within a reasonable time frame. A study conducted by Dr. Susan Archer in 2000 concluded: “[US military] Training needs more emphasis on cultural expectations and social interactions, negotiation and conflict negotiations of intensity/hostility.” An independent IFOR study reached the same broad conclusions in 1996.<sup>56</sup> Bosnia offered the military the opportunity to rehearse and make adjustments prior to its involvement in Kosovo in 1999.

## **Kosovo**

Until 1989, Kosovo was an ethnically Albanian province of Serb, although largely autonomous. In 1989, Slobodan Milosevic changed the status of Kosovo, bringing it under control of Belgrade. In 1998, a combination of Kosovo Liberation Army (KLA) incursions into Serbia, followed by Serbian military and police forays into Kosovo, killed approximately 1,500 Kosovo Albanians and displaced 400,000 sent fleeing into neighboring Albania. The humanitarian crisis brought international attention to Kosovo. A series of United Nations Security Council Resolutions (UNSCR), negotiations between the North Atlantic Council (NAC), the Supreme Allied Commander Europe (SACEUR), the EU foreign ministers, and the US failed to stop the crisis. The threat of air strikes in October 1998 forced Milosevic to end the

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<sup>56</sup> Bauman, Gawrych and Kretchik, *Armed Peacekeepers in Bosnia*, 196.

violence temporarily and allow the refugees the right of return. The UN Security Council passed UNSCRs 1199 and 1203, which among other things established a Kosovo Verification Mission (KVM) to enforce the peace. Nevertheless, violence flared up again in 1999. Between January and March a Six Nation Contact Group and UN representatives attempted to stop the bloodshed.

Operation ALLIED FORCE was authorized by UNSCR and the NAC in March 1999. Between March 1999 and September 1999 NATO air forces conducted coalition warfare. A seventy-seven day bombing campaign brought Milosevic back to the negotiating table. Operation JOINT GUARD was authorized under UNSCR 1244, which sanctioned immediate deployment of security forces to enforce the will of the international community. Tim Judah, author of *Kosovo: War and Revenge* suggests the NATO implementation force, KFOR, had no idea how to deal with the complexity confronting them. Kosovar Albanians had been displaced, their homes burned, identification papers seized and any form of identification that would suggest they were native to Kosovo destroyed by the Serbs. The refugee return was supervised by KFOR, but KFOR soldiers “had no idea how to deal” with the complexity they faced, claims Judah.<sup>57</sup> Kosovo Albanians devoid of identification and attempting to reclaim their property resorted to violence against Serbs would have given tacit approval or actively participated in the cleansing.

Furthermore Judah maintains, “In the three years since the end of the war, Kosovo, and Serbia had undergone massive transformations—yet at the same time, there was no reconciliation between Serbs and Albanians”.<sup>58</sup> This fact is substantiated by a report of *The Annual General Assembly of the Forum of European Cultural Networks*. “Conflict and tolerance of cultural identities”, claims the report, “represent a constant cultural dilemma, since each culture contains within it elements of both tolerance and conflict. Stressing one's own cultural identity while at the same time remaining intolerant, disrespectful and prejudiced in relation to other cultures

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<sup>57</sup> Tim Judah, *Kosovo: War and Revenge*, (New Haven, CT: Yale University Press, 2002), 288.

<sup>58</sup> Judah, *War and Revenge*, vii.

inevitably ends in conflict and violence.”<sup>59</sup> If Somalia, Bosnia and Kosovo are representative as Huntington suggests of clashes of civilization, further highlighted by more recent intolerances in Afghanistan and Iraq, there remains an obvious need to understand and unravel the cultural mystery that underlies ethnic conflict.

Operationally, JOINT GUARD presented NATO with an unparalleled challenge to project land power into Kosovo, which allowed the Serbs to complete the ethnic cleansing of Kosovo. Eight years of ethnic violence had given the Serbs plenty of time to perfect their techniques. When NATO forces arrived in Kosovo they were handed a nightmare to unravel. The soldiers were put in the position of arbitrator, trying to reintegrate the population and sort out who owned what property and create ethnically diverse local governments. The Kosovar Albanians' frustrations led to further violence, this time against the minority Serbs. In the eyes of some Kosovar Albanians it legitimized the Kosovo Liberation Army (KLA), which further served to unhinge their aspirations for independence. United States and NATO troops remain in Kosovo today to enforce UNSCR 1141 to prevent historical/cultural fault lines from rupturing: Kosovo being one of the historical fault lines between Islam, Orthodoxy and Christianity.

Additionally, Kosovo irreparably damaged the US and NATO alliance, bringing an end to Wilsonian idealism. Michael Ignatieff, author of *Virtual War* catalogs the conflict within the alliance, stating: “At the military level, alliance cohesion was a myth.” His proof exists in three examples, which include Britain’s pilot’s unwillingness to bomb Serbian TV and power grid for fear of violating the Geneva Convention; Sir General Michael Jackson’s refusal to intercept a Russian column speeding toward Pristina; and most importantly, the disproportionate danger US pilots faced flying the overwhelming majority of the war’s combat missions.<sup>60</sup> Ignatieff suggests

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<sup>59</sup> Culturelink Network, “The Annual General Assembly of the Forum of European Cultural Networks”; accessed at: <http://www.culturelink.org/review/29/cl29ce.html>

<sup>60</sup> Michael Ignatieff, *Virtual War: Kosovo and Beyond* (New York: Metropolitan Books, 2000), 206-207.



this was nothing more than the “inability of [NATO] governments to back principle with decisive military force”.<sup>61</sup> In the future there are two possible answers to these revelations, unilateralism or work within our ally’s cultural constraints. Using the framework provided in this monograph, future US coalition planners will be required to analyze the cultural constraints, caveats or political handicaps of our coalition partners. These trends will not abate; rather they will increase, demanding greater cultural understanding.

## Summary

In reply to the three questions posed at the beginning of this section, culture is values, beliefs, norms and institutions which transmit patterns of meaning, modes of living and customs. Cultural competence is the nexus between cultural understanding and cultural intelligence that provides insights into actor’s intentions. Furthermore, cultural intelligence is acquired through knowledge and can only be assimilated through experience and receptivity. Militarily, developing cultural sensitivity has developed non-continuously since the United States involvement in Somalia in 1992 and 1993. What the first decade and a half portends for the future will be the necessity to calculate the cultural effect from campaign design to conflict termination. Prophetically the European council recently reported on its web link:

“The end of the present century is marked by a planetary movement towards intercultural communication, in which networks feature very prominently. The nineties have actually seen the emergence of a new concept - networking of culture. However, running in parallel with the processes of opening and linkage on the global scale, there are opposite processes at work, particularly in the countries in transition, where we see a strong tendency to return to individual cultures, traditions and values.”<sup>62</sup>

Furthermore, the US must be cognizant of our ally’s culture and neutral actors on the battlefield. Understanding and leveraging there culture can significant enhance the prospects of

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<sup>61</sup> Ignatieff, *Virtual War*, 7.

<sup>62</sup> Culturelink Network, “The Annual General Assembly of the Forum of European Cultural Network”, accessed at <http://www.culturelink.org/review/29/cl29ce.html>

success in coalition warfare. Finally, given the ongoing trend of “intervasion” by the West in the past decade and a half, it is necessary to develop an operational cultural framework that fuses understanding with analysis to achieve cultural dominance. The subsequent chapter will examine some of the existing frameworks of cultural competence that exist in the civilian sector and apply them to a military framework for understanding ourselves, our allies, our adversaries and the neutrals within our battlespace.

## OUR OWN CULTURAL LENS

**“If you know the enemy and know yourself, you need not fear the result of a hundred battles. If you know yourself, but not the enemy, for every victory gain you will also suffer a defeat. If you know neither the enemy nor yourself, you will succumb in every battle.”<sup>63</sup>**

Sun Tzu

### Brooks Peterson and Geert Hofstede—Cultural Intelligence

Seeking contrast between our own culture and the host of actor’s representative in the post-Cold War era is indispensable to cultural understanding. That said, this section endeavors to answer the following question. What preexisting models (frameworks) best help the commander visualize cultural contrasts in his battlespace? Brooks Peterson, the author of *Cultural Intelligence: A Guide to Working with People from Other Cultures* has designed a model that helps businessmen improve workplace communication, business relationships and profits in the global workplace. Peterson developed his Personal Style Indicator to allow his clients to recognize the contrast between themselves, their competitors, neutrals actors and business partners. Peterson’s Personal Style Indicator (Figure 5) uses a series of questions to identify and graphically depict your cultural style; compare it to the characteristic style of any of the 70 countries for which Peterson has developed a profile, and suggest ways to effectively navigate

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<sup>63</sup> Sun Tzu, *The Art of War* published in “Roots of Strategy: The 5 Greatest Military Classics of All Time”. (edited by Brig. Gen. T.R. Phillips) (Mechanicsburg, Pennsylvania: Stackpole Books, 1985), 110.

cultural contrast. The benefit Peterson's conclusion provides his clients is the same advice Sun Tzu penned in *The Art of War*.

Peterson and his contemporary Gert Hofstede, author of *Five Cultural Dimensions*, bring a second thing to the discussion on culture and cultural intelligence, which is a framework for self-understanding. This is important because the culture of our adversaries, allies and neutrals is revealed when we contrast our own cultural style to theirs. Peterson relates: "No matter where you're from, and even if you think you're a local like everyone else, I assure you that you do have a culture and your style does matter".<sup>64</sup> Style is another way of stating what Sun Tzu advised—"know yourself". Militarily, Peterson's and Hofstede's models have limited applicability. The military value of Peterson's tool is an analytical framework for depicting the delta between ourselves and all the actors in our theater of operation and how these differences can be leveraged or cultural triggers can be avoided.

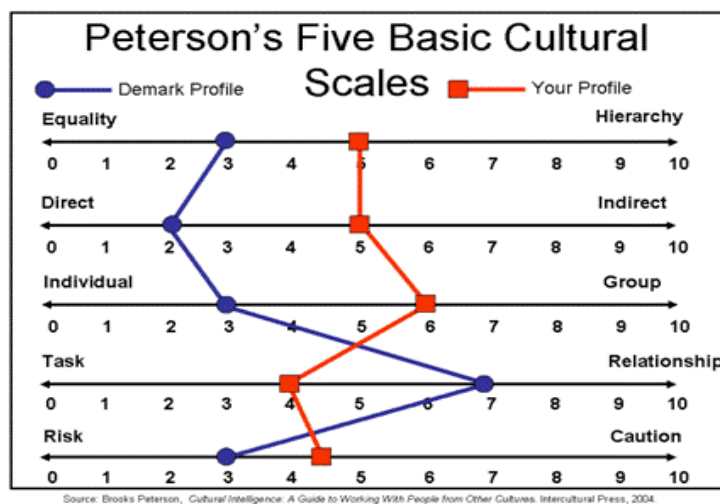
The reason Peterson and Hofstede's models were preferred was because they attempted to measurably quantify cultural contrast, despite their reductionism. They accomplish this by forcing their paying clients to understand their own cultural biases and compare those to their prospective international client. It is important to understand this is not science. It is art. Peterson's and Hofstede's compendiums of cultural styles fail to take into account differences between sub-groups of a nation, because they are focused on business elites and urbanites. Their style indicators represent a generalized business culture of a given country. Therefore, the limitation of their model is its lack of exactness. This is an area of study the US military would be wise to invest resources. In the interim culturally competence staff officers must develop a profile of the target countries, tribes/clan's cultural style to accurately depict each cultural style.

In Figure 5 below, Peterson depicts the cultural factors that impact the differences between a hypothetical US businessman and his Danish client. The Danish client is less

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<sup>64</sup> Brooks Peterson, *Cultural Intelligence*, 155.

encumbered by adherence to societal or hierarchical standards, according to the first scale. Similarly, the Danish client clearly communicates and negotiates, whereas Peterson's hypothetical businessman walks the line between directness and subtly in communication. Similar to the first scale, Peterson's hypothetical Danish businessman is not confined by group or social norms, as opposed to Peterson's client. However, the Dane is far more concerned about maintenance of relationship than the transaction. This point may represent a cultural leverage point for Peterson's US businessman. Nevertheless, the Danes concern about maintenance of relationships is countered by his willingness to accept more risk. What this scale communicates is a delta exists between the Danish businessman's concerns about his peer status which stands in stark contradiction to his other cultural factors. The conclusion is the client should leverage the Danes company loyalty to achieve his client's business objectives.



**Figure 5-Brooks Peterson's Personal Style<sup>65</sup>**

Let us apply Peterson's scale to a military situation. The scale remains as it is for this example. Your counterpart is less constrained by formality and military protocol. That represents a significant advantage in negotiating. However, his directness is something you must

<sup>65</sup> Brooks Peterson, *Cultural Intelligence: A Guide to Working with People from Other Cultures* (Saint Paul, MN: Intercultural Press, 2004), 85.

be prepared to counter. His lack of group-orientation however is off-set by his loyalty to his companions. Therefore, if we are going to leverage this factor culturally, we will have to separate his loyalty to the group, from his strong sense of individual expression. However, his willingness to take risk, coupled with his strong sense of individualism and informality, maybe a cultural leverage point in our negotiations. The analytical expression of Peterson's Cultural Style Indicator is what comprises cultural intelligence.

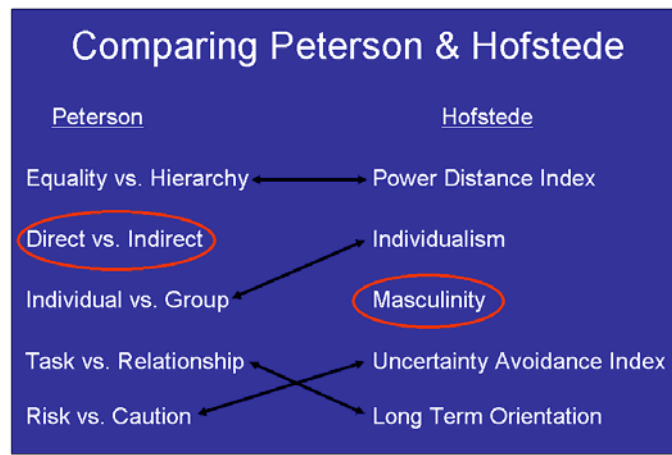
As indicated previously, operational level planners need are a set of comprehensive, generic, quantifiable cultural norms that apply to each of the different actors. Here, Peterson's Cultural Style Indicator can begin to unravel without the assistance of a broader framework for contrasting competing cultures within a military setting. However, most importantly, his model emphasizes constructing and contrasting own cultural style with our opponent. However, employing Peterson's limited model without alteration equality and hierarchy can help planners understand decision-making and who makes decisions. Direct and indirect communication determines the face value of works or whether the listener should read subtle body language. Indirect communicators avoid conflict, favoring diplomacy, which is atypical in the Middle East or Asia. Individual versus group orientation defines loyalties. Group oriented cultures such as Asian culture places conformity over individual expression. Task versus relationship orientation can help planners understand why rapport is essential to Arab culture rather than conducting business quickly and efficiently. Cautious cultures avoid change and attach themselves to proven patterns, as opposed to risk-taking cultures that quickly change and welcome innovation.<sup>66</sup>

Professor Geert Hofstede of Maastricht University in the Netherlands has patented five cultural dimensions which he calls Personal Power Index (PDI), Individualism (IDV), Masculinity (MAS), Uncertainty Avoidance Index (UAI) and Long Term Orientation (LTO).

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<sup>66</sup> Ibid, 55.

Figure 6 compares Hofstede and Peterson's models and their dissimilarities. A quick comparison supplies an additional cultural dimension not found in Peterson's model.



**Figure 6-Comparison of Peterson & Hofstede's Cultural Figure (Created by Author)**

Since we have already defined Peterson's individual versus group index it is only necessary to define Hofstede's Masculinity index. Masculinity "focuses on the degree the society reinforces, or does not reinforce, the traditional masculine work role model of male achievement, control and power."<sup>67</sup> For example, a low masculinity index exists in many Central African nations in which the women do all the household labor and care for the children, while the men are generally found at the village epicenter socializing. Similar to Peterson, Hofstede has developed cultural dimension scores for fifty-five countries, which are available on his website. The masculinity index has a disproportionately high value when compared to Hofstede and Peterson's other traits. Masculinity represents a power cultural lever that when used prudently can achieve extraordinary results.

Taken together Peterson and Hofstede's models demonstrate a framework for analytically measuring the contrasts between cultures. The reader should be warned, both of these authors' frameworks are limited by broad generalizations and narrowly defined cultural components, a luxury military a planner can ill afford. Nevertheless, their cultural dimensions and analytical

<sup>67</sup> Geert Hofstede, accessed at, <http://www.geert-hofstede.com/>

measurements provide a means of visualizing cultural variation and deducing leverage points. What is needed is a much broader cultural context, which incorporates components useful to military planners. In a subsequent section, social scientists Ernst Cassirer and Bernard Lewis will help us broaden the cultural context and apply terms more appropriate for military planners. Instead of cultural context, an appropriate military term of reference is *cultural intelligence requirements*.

### **Ernst Cassirer Six Components of Culture—*Philosophy of Symbolic Form***

Ernst Cassirer, was a leading exponent of neo-Kantian philosopher and father of modern anthropology. Neo-Kantian philosophy drew on the connection between Kant's philosophy (knowledge is constrained by the physical world) and socialism. In 1923 Cassirer published *Philosophy of Symbolic Form*. Cassirer believed "human beings were symbolic animals. The whole range of our achievements, **science, religion, arts, history, political thought, and language**—they all are unique parts of our evolutionary process and help us to understand our experience and the world."<sup>68</sup> In his seminal work *Essay on Man* he concluded: "Unless we succeed in finding a clue of Ariadne to lead us out of this labyrinth (the clue Ariadne gave Theseus to navigate the Cnossian labyrinth after killing the Minator), we can have no real insight into the general character of human culture; we shall remain lost in a mass of disconnected and disintegrated data which seem to lack all conceptual unity".<sup>69</sup> In order to untangle the data disconnectedness and disintegration, Cassirer fashioned his six components of culture, which until recent times has served cultural anthropologists well.

Cassirer's six components of culture are a broad framework for understanding a social system. Nevertheless, Cassirer's broad framework and apposite counsel does not supply a sufficiently expansive range of cultural characteristics military planners need to generate a

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<sup>68</sup>Petri Liukkonen, "Ernst Cassirer, (1874-1945)" accessed at <http://www.kirjasto.sci.fi/cassir.htm>

<sup>69</sup> Ernst Cassirer, *Essay on Man* (Garden City, NY: Doubleday, 1954), 337.

cultural index like Peterson's that reflects the diverse cultural circumstances planners may find themselves. Therefore we must look to a more contemporary cultural anthropologist.

### **Bernard Lewis' Cultural Framework—*Political Language of Islam***

Bernard Lewis, contemporary cultural anthropologist and author of *The Political Language of Islam* expanded Cassirer's framework, to include thirty sub-components (Figure 7). Lewis's framework offers a starting point for developing cultural intelligence requirements. Possessing a framework for sufficiently measuring cultural contrasts and a catalog of potential cultural intelligence requirements, it is now possible to begin applying culture to military decision-making tools. Not only does Lewis' framework expand the cultural dimensions, it can aid planners in identifying *cultural decisive points*. In other words, leverage points that link directly to a COG.

### **Summary**

The best model that contrasts US military culture and associated actors for the commander, visualizes the delta between our own culture and all the actors. In summary, planners must begin by mapping US military culture. Ernst Cassirer provides six broad categories of a cultural framework, coupled with Bernard Lewis' smorgasbord of cultural components to contrast US culture with allies, adversaries and neutrals. During Contingency Planning, planners should invest time and energy identifying *cultural intelligence requirements* and cultural decisive points by creating a data-base that identifies and defines operational cultural components. Furthermore, to quantify the difference planners should develop an analytical scale whereby they can compare and contrast friendly *cultural critical factors* with the other actors *critical cultural factors*. Figure 8 is a sample tool for analytically comparing culture.



Lewis...building a framework for thinking about cultures...	
• History	• Equality
• Time	• Freedom
• Space	• Success
• Peace	• Failure
• War	• Family
• Power	• Loyalty
• Justice	• Order
• Honor	• Honesty
• Law	• Legitimacy
• Anarchy	• Truth
• Boundaries	• Institutions
• Sin	• The Individual
• Authority	• Government
• Wealth	• Education
• Myths	• The Nation and Language

**Figure 7-Bernard Lewis' Cultural Framework<sup>70</sup>**

The scales used in Figure 8 are arbitrarily selected to provide a useful example. Each scale has a positive cultural attribute at one end, contrasted by a negative attribute on the other. Underneath are increments that provide better resolution to the scale. The five scales depicted in Figure 8 can be expanded based on the number of cultural intelligence requirements planners need to visualize the areas of tension and leverage points. The position of each actor on the scale is analytically determined by the planner, which requires the planner to synthesis the differences between cultures for his or her commander. Bear in mind, this is a tool to depict possible leverage points and tensions between actors. Future studies may find ways to refine the quantifiably and more accurately represent the leverage points and tensions. In the subsequent section this monograph will suggest a way of incorporating the tool illustrated in Figure 8 into the intelligence process.

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<sup>70</sup> Bernard Lewis, *The Political Language of Islam* (Chicago: University of Chicago Press, 1998), 1-116.

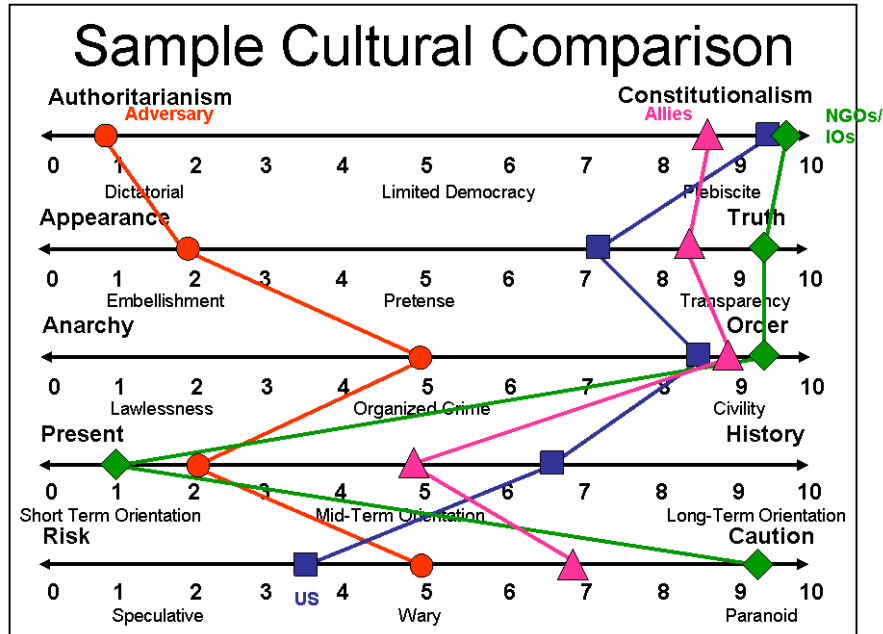


Figure 8-Sample Cultural Comparison Scale (Adapted by Author)

## CULTURE, EMERGING THEORY & CAMPAIGN DESIGN

This section poses the question, how does a systems approach help planners and commanders integrate cultural competence into J/IPB? This section will define social systems, examine the benefits of a systems approach and how this approach can be applied to campaign design and JIPB. Finally, this section will briefly touch on the benefits and complementary aspects of Systemic Operational Design (SOD) as they apply to our understanding of social systems.

### Socio-cultural Systems

Socio-cultural systems are voluntary arrangements wherein “purposeful members” bond together in a “second-degree agreement, which is an agreement based on common perception”, maintains author Jamshid Gharajedaghi.<sup>71</sup> In other words, unless an actor within a culture is

<sup>71</sup> Jamshid Gharajedaghi, *Systems Thinking: Managing Chaos and Complexity: A Platform for Designing Business Architecture*, (Boston: Butterworth Heinemann, 1999), 85.

willing to challenge a particular world view, cultures are inherently distrustful and suspect to change. In *Systems Thinking: Managing Chaos and Complexity*, Jamshid maintains, when cultures do not comprehend, they reject. Conversely, socio-cultural systems fear rejection and have a strong tendency toward conformity, which are “important obstructions to social change.”<sup>72</sup> The description rendered by Jamshid Gharajedaghi elucidates the complexity of cultural systems, the competency associated with understanding them and the demand placed on operational planners to understand socio-cultural systems inter-workings. To better understand cultural systems this discourse will use a systems approach to develop cultural competence.

## Systems Approach

This section will answer the following fundamental questions. How does a systems approach help planners and commanders integrate cultural competence into J/IPB? Furthermore, how do planners integrate operational design and a systems approach to culture? The position taken by this exposition is, cultures are complex systems that are best understood by submitting them to a system approach. A “systems approach integrates the analytic and the synthetic method, encompassing both holism and reductionism.”<sup>73</sup> Ernst Cassirer dissected human culture into a system composed of six basic components: **science, religion, arts, history, political thought, and language**. Operational Net Assessment (ONA) much like Cassirer’s Six Components of Culture consists of six dimensions—**political, military, economic, social, infrastructure and information** (PMESII). Learning organizations that apply Cassirer’s and Lewis’ frameworks to a systems approach can, in time, interpret the complexity and perceived chaos in any cultural system.

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<sup>72</sup> Gharajedaghi, *Systems Thinking*, 105.

<sup>73</sup> Francis Heylighen, “Basic Concepts of Systems Approach”, accessed at, <http://pespmc1.vub.ac.be/SYSAPPR.html>

Early reports indicate the 2006 Quadrennial Defense Review (QDR) will move the US military toward a capabilities-based approach as opposed to a threat-based approach to adversaries. Furthermore, the report expects not just Special Operations Force, but conventional forces will be conversant in foreign culture, which is combined with an increased role in foreign military training. Finally, the QDR discloses the continents, regions and cultures of interest—particularly Africa, the Middle East, Asia and Latin America.<sup>74</sup> Understanding the capabilities of the cultures associated with these regions is best understood using a systems approach. We know this from experience in Iraq and Afghanistan. It is the tribal/clan networks that are crucial to understanding Iraqi and Afghani cultural norms. This assertion further extenuates the necessity to amend the JIPB process and make it systems friendly. The JIPB then is the appropriate decision-making tool to integrate a systems approach to the adversary and associated actors, but it must be compatible with campaign design also.

Campaign design and a systems approach are not mutually exclusive concepts. They are supporting concepts that aid planners in developing a more holistic approach to campaign design. Figure 9 offers a technique for fusing a culture-conscious, systems approach, to campaign design. Allied and neutral Centers of Gravity (COGs) have been added to the campaign design model. By virtue of the constraint of space the indigenous population is not depicted. However, the reader will notice more than one adversary is depicted, which is consistent with the contemporary threat model.

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<sup>74</sup> Office of the Secretary of Defense, *2006 Quadrennial Defense Review* (Washington, GPO, 2006), 58-86.

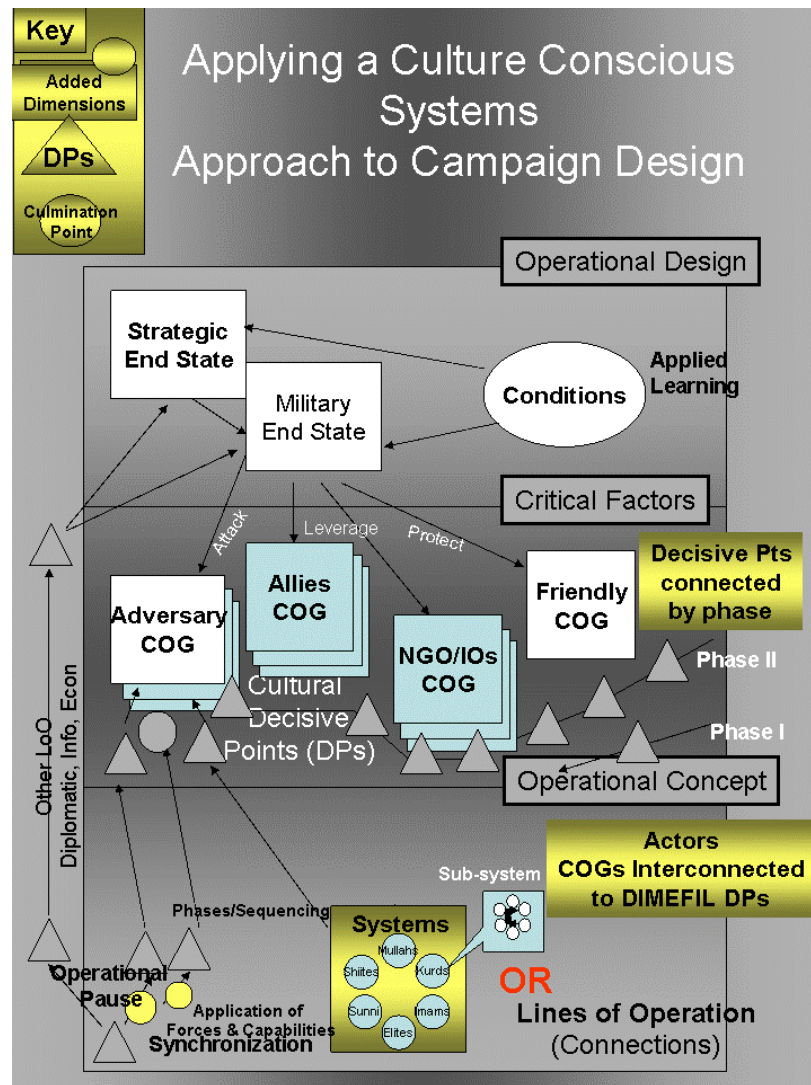


Figure 9-Culture Conscious Systems Approach to Campaign Design (Adapted by Author)<sup>75</sup>

In Iraq our allies all arrived with caveats. For instance the Swedes contributed medical support, but denied conventional military capabilities to Operation Iraqi Freedom. Political constraints dictated where their contribution was positioned in the battlespace, because their public and elected officials would not tolerate casualties. Theoretically, the Swede's COG is casualty aversion. Seeing one of their doctors or medical personnel taken hostage could have

<sup>75</sup> Norman M. Wade, *The Joint Forces & Operational Warfighting SMARTBOOK*, (Lakeland, FL: The Lightning Press, 1999), 3-30.

adverse second-order effects on our other multi-national coalition partners. A similar set of circumstances may be envisioned for NGOs, IOs and the indigenous population.

A culture-conscious approach to campaign design combines the increased complexity of asymmetric and coalition warfare. No matter whether planners apply emerging concepts, such as Effects-Based Approach (EBA), Systemic Operational Design (SOD), SoSA or codified doctrine, a culture-conscious approach is appropriate. Again, a systems approach applies a more holistic technique of deconstructing social systems. Furthermore, borrowing from the key component of SOD it is possible to learn and adapt from cultural tensions. Controversially, SOD proponents favor conducting limited raids to learn how an actor may operate in the future. This is a sound technique for collecting cultural intelligence. In conclusion, a culture-conscious approach to campaign design is a scaleable framework that planners can apply as the situation dictates. However, if history provides any lessons, military planners may find themselves adding to, rather than subtracting actors to this framework.

## **Summary**

In summary, holism and reductionism are the best approaches to dissecting complex socio-cultural systems. Nevertheless, this demands commanders and planners demonstrate a high degree of cultural competency during pre-hostilities Contingency Planning (CONPLANS). Planners should apply a systems approach to social systems to analyze their composite sub-systems. Applying a broad framework such as Ernst Cassirer's six components of culture to a socio-cultural system and Bernard Lewis' framework for understanding the sub-components of culture, it is possible to identify cultural decisive points and link them to COGs (See Figure 9). Taken together, the tools proffered thus far in this monograph make it possible operationally to develop a comprehensive, culturally competent understanding within the campaign design framework. What remains is to apply the proffered framework to the intelligence process.

## INTREGATING CULTURE INTO JIPB

**“Fundamentally, here in Baghdad we do two things: We’re either fighting for intelligence or we’re fighting based on that intelligence.”**

**Lieutenant General Martin Dempsey (November 2003)<sup>76</sup>**

### Definitions—JIPB Support to Campaign Planning

Joint Publication 2-01.3, *Joint Tactics, Techniques and Procedures for Joint Intelligence Preparation of the Battlefield* states: “JIPB supports campaign planning by identifying significant facts and assumptions about the total battlespace environment and the adversary”.<sup>77</sup> The JIPB is “a continuous process which enables joint forces commanders and their staffs to visualize the full spectrum of adversary capabilities and potential courses of action across all dimensions of the battlespace. JIPB is a process that assists analyst in identifying facts and assumptions about the battlespace environment and the adversary. This facilitates campaign planning and friendly COAs by the joint force staff. JIPB provides the basis for intelligence direction and synchronization that supports the COA selected by the JFC.”<sup>78</sup> Furthermore, Joint Publication 2-03.1 states: JIPB “supports the JFCs and component commander’s campaign planning by identifying, assessing and estimating the adversary’s [neutrals, allies and the local population] centers of gravity, critical vulnerabilities, capabilities, limitations, intentions, most likely COA, and COA most dangerous to friendly forces and mission accomplishment.”<sup>79</sup>

This section will address “how to” integrate cultural competence into JIPB. There are currently no non-kinetic approaches which leverage the adversary’s cultural vulnerabilities, protect our ally’s cultural vulnerabilities, leverages the indigenous population’s cultural

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<sup>76</sup> Matt Kelley, “U.S. Intelligence Effort Lacking in Specialists,” *San Diego Union-Tribune*, 22 November 2003, p. 1.

<sup>77</sup> US Joint Chiefs of Staff, Joint Publication 2-01.3, *Joint Tactics, Techniques and Procedure for Joint Intelligence Preparation of the Battlefield*, (Washington: GPO, 2000), I-4.

<sup>78</sup> USJCS, Joint Publication 2-01.3, vii.

<sup>79</sup> Ibid, viii.

sensitivities or neutral (NGOs/IOs) culture. In the previous section these vulnerabilities and sensitivities were identified as COGs.

## Culture and Operational Net Assessment

Operational Net Assessment (ONA) conceptually provides a holistic framework for understanding the enemy as an interrelated system of systems. Joint Intelligence Preparation of the Battlefield does not currently allow for a systems approach to intelligence. Therefore, this section will make the following recommendation. ONA can help planners develop cultural competence and integrate culture into JIPB. Operational Net Assessment is dependent on a culture of learning—active and continuous learning—about the adversary and every dimension of the battlespace environment. Subsequently, this section will bring together all of the elements previously discussed into a coherent system before presenting a final recommendation.

Operational Net Assessment, according to Joint Warfighting Center Pamphlet 4 is “the integration of people, processes, tools that use multiple information sources to build shared knowledge of the adversary, the environment, and ourselves.”<sup>80</sup> Operational Net Assessment uses a System of Systems Analysis (SoSA) process that views the enemy as an interrelated system of political, military, economic, **social**, infrastructure and information (PMESII) subsystems (Figure 10). “System of System Analysis attempts to identify, analyze and relate the goals and objectives organization, dependencies, inter-dependencies, external influences, weakness, vulnerabilities and the other aspects of the various systems.”<sup>81</sup> One caveat—PMESII is a western construct and based on broad assumptions, which begs the question, are the dimensions we use appropriate? If the PMESII construct is not appropriate, planners should amend it to reflect the existing cultural construct.

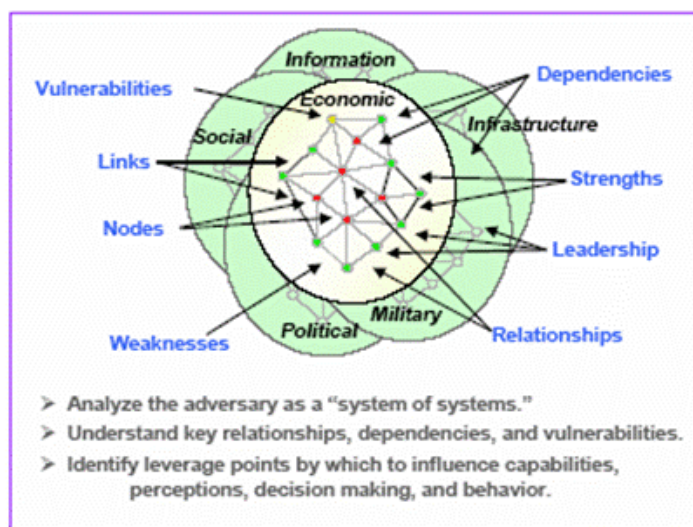
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<sup>80</sup> US Joint Forces Command, JWFCPam 4, *Doctrinal Implications of Operational Net Assessment*, (Suffolk, VA: Doctrine Division of JWFC, 2004), 1.

<sup>81</sup> USJFC, JWFCPam 4, GL 3.



A social system may include the religious establishment, tribes, clans, student unions, expatriate communities, refugees, arts and culture, health care and education institutions, the role of women, languages and dialects, criminal elements and terrorists. It may cross national or regional boundaries as well. A systems approach then determines the critical nodes within each system, the links between nodes or subsystems and the relationships, dependencies, vulnerabilities and weaknesses. From a nodal and link analysis, actions may be assigned to achieve certain effects.



**Figure 10-Systems of Systems Analysis<sup>82</sup>**

The starting point for ONA must be the cultural context within the theater of operations. To do this the joint community should analyze the region and contingency areas, deconstructing their social systems and cultural norms. Establish the interconnectedness between country "X" and its neighbors. Whether we are talking about vulnerable areas such as Nigeria where sectarian violence threatens US access to oil or Algeria where a virulent insurgency continues to threaten the European communities access to natural gas. The list can be exhaustive. Nevertheless, in an era of increased sensitivity to kinetic solutions, culture provides a non-kinetic alternative; which

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<sup>82</sup> Ibid, 11.

military planners can leverage against our enemies, avoid major incidents with our allies, prevent alienating neutrals, and win over fence sitters within the local population. First though culture and JIPB must be assigned the proper level of war.

## **Operational JIPB**

Operational level JIPB, according to Joint Publication 2-03.1, incorporates a variety of factors, which includes political, religious, social, information or economics factors. However, it is limited by two important factors. First, it is limited by its inability to constructively synthesize the interrelatedness of the aforementioned factors with the JIPB framework. Second, it is also limited by its inability to link systems, critical cultural factors and COGs. It is worth restating, this monograph promotes a combination of systemic and systems-based approaches. The methodology advocated in this monograph promotes cultural competence through learning, which is an essential element of Systemic Operational Design (SOD) concept. Additionally, this methodology advocates holistic, reductionism methods, within the construct of JIPB, borrowed unabashedly from the Effects Based Approach (EBA) concept<sup>83</sup>. This methodology operates cleanly within the joint doctrinal framework outlined in Joint Publication 3-0 *Doctrine for Joint Operations* and Joint Publication 5-0, *Doctrine for Joint Planning*. The subsequent discussion will be informed by the construct outlined in Chapter 1 and 4 of Joint Publication 2-03.1.

Earlier in this monograph we defined cultural competence as the fusion of cultural understanding with cultural intelligence that allows focused insight into current operations and infers insight into intentions of specific actors and groups. Furthermore, a systems approach integrates the analytic and the synthetic method, encompassing both holism and reductionism. What remains is to integrate these two elements into JIPB. Figure 11 depicts the four steps of the JIPB process in an asymmetrical environment, as compared to Figure 4 which simply depicts the

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<sup>83</sup> Both EBO and SOD are concepts, not accepted doctrine.

four steps. The asymmetrical approach to JIPB more accurately describes the globalized, interconnected, contemporary operating environment. Asymmetrical warfare includes threats outside the range of conventional warfare, consequently, the social (culture) battlefield dimension of asymmetrical warfare, demands a reexamination of the JIPB process. Somalia, Haiti, Bosnia, Kosovo and now Afghanistan and Iraq provide recent examples of this phenomenon. The remainder of this section will demonstrate, using a step-by-step approach, how to integrate culture into the four steps of JIPB using a systems approach.

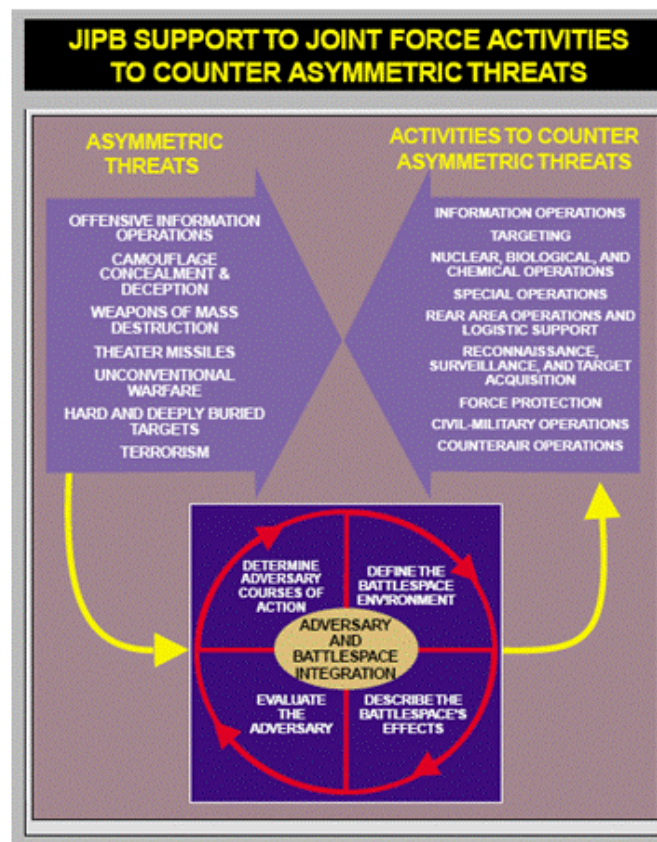


Figure 11 Joint Publication 2-03.1 Joint Intelligence Preparation of the Battlespace Support to Counter Asymmetrical Threats<sup>84</sup>

<sup>84</sup> USCJCS, Joint Publication 2-03.1, IV-2.

## Define the Battlespace Systems and Environment

Carl von Clausewitz counsels: “War is the realm of uncertainty; three quarters of the factors on which action in war is based are wrapped in a fog of greater or lesser certainty...The commanders must work in a medium which his eyes cannot see; which his best deductive powers cannot fathom; and with which, because of constant changes, he can rarely become familiar”.<sup>85</sup> In the post-Cold War era Clausewitz statement appears extraordinarily perceptive. Media, internet, satellite imagery, electronic and signals intelligence and unmanned aerial vehicles (UAVs) have enhanced the deductive powers of the commander and burned through some of the proverbial fog of uncertainty. Nevertheless, adversary intentions, their means of communication, and those of other actors, remain outside the realm of situational awareness. Furthermore, as Clausewitz suggests, the changing nature of battlespace environment is in constant motion, making analysis thorny.

Joint Publication 2-03.1 asserts: “The failure to identify all relevant characteristics may lead to the joint force being surprised and unprepared when some overlooked feature of the battlespace exerts an influence on the accomplishment of the joint forces mission.”<sup>86</sup> The reader will notice in Figure 12 the fifth bullet is highlighted. This bullet was attempting to impress on operational planners the need to be mindful of geographic, population demographic, political and socioeconomic, infrastructure and information systems, environmental considerations, and psychological make up of decision making characteristics.<sup>87</sup> What they failed describe was the interconnectedness between these elements. This author submits it is the interconnectedness that helps the planner determine the cultural levers and contributes to cultural competence. But this can only be achieved when we ask the right questions.

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<sup>85</sup> Carl von Clausewitz, *On War* (New York: Alfred A. Knopf, 1993), 117.

<sup>86</sup> USCJCS, JP 2-03.1, II-2.

<sup>87</sup> Ibid, II-4,5.

The following set of questions is offered within the JIPB framework as a starting point for developing cultural competence and determining the full, multi-dimensional, geographic and non-geographic spectrum of the joint force battlespace. **Geography:** What areas of this country/region hold historic or ideological value, and to which group(s) of actors? **Population**

**Demographics:** Where are the fault lines between ethnic groups? What historic tensions have existed along the fault line? How strong are the sentiments of the actors associated with these

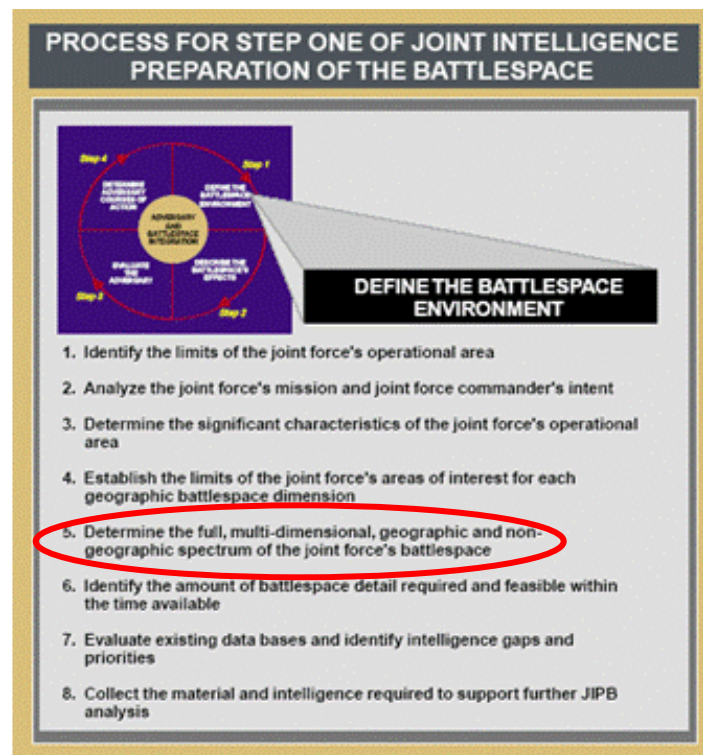


Figure 12-Joint Publication 2-03.1 Step One of JIPB<sup>88</sup>

historic tensions? **Political:** What political ideologies does each of the actors espouse? Is a specific actor instigating or leveraging a historic tension and why? How are the actors using the political system to promote their ideology? **Socioeconomic:** What social and/or economic factors have contributed to the actor(s) being disenfranchised? **Information:** What messages or themes are actors using to leverage tensions? **Infrastructure:** How are resources and revenues being

<sup>88</sup> USCJCS, Joint Publication 2-03.1, II-3.

exploited to disenfranchise other groups? **Environmental:** Are certain actors threatening the ecological balance of the region and why? **Psychological:** What style of decision-making does each group of actors employ? What decision making characteristics can be leveraged to influence the strategic/operational objectives?

These are a sampling of the kinds of questions that should be applied using a systems approach to disclose critical links, nodes and key vulnerabilities. It is for this reason, the author suggests renaming step one to *Define the Systems and Battlespace Environment*. The author acknowledges that chapter IV of Joint Publication 2-03.1 suggests ways joint force activities and operations can counter adversary asymmetric advantages. Where the JP falls short is in applying a holistic, learning methodology to define the battlespace environment. Nor does it consider the interconnectedness and vulnerability of our allies, neutrals and our own culture. It is recommended a series of parallel questions should be derived for each. Furthermore, it is important to maintain an ongoing data base on each culture represented in the campaign. James Gordon in his 2004 monograph entitled *Cultural Assessments and Campaign Planning* offers a model for cataloging cultures and is supplied below (Figure 13). His work represents an excellent jumping point that deserves further study. The next section will suggest ways of integrating cultural competence in describing the battlefield effect.

- Group \_\_\_\_\_
- Basic Elements of culture (can be added to or removed):
  - Religion:
  - Language:
  - Ethnicity:
  - Tradition:
  - Political Organization:
  - Ideology:
  - Economy:
  - History:
  - Geographic and Climatic Environment:
- What are the dominant cultural elements for this population group?
- What are the dominant values, beliefs, attitudes and goals as a result of the interaction of these elements?

Figure 13-Gordon's Cultural Assessment Worksheet<sup>89</sup>

## Describing the Battlespace's Effects

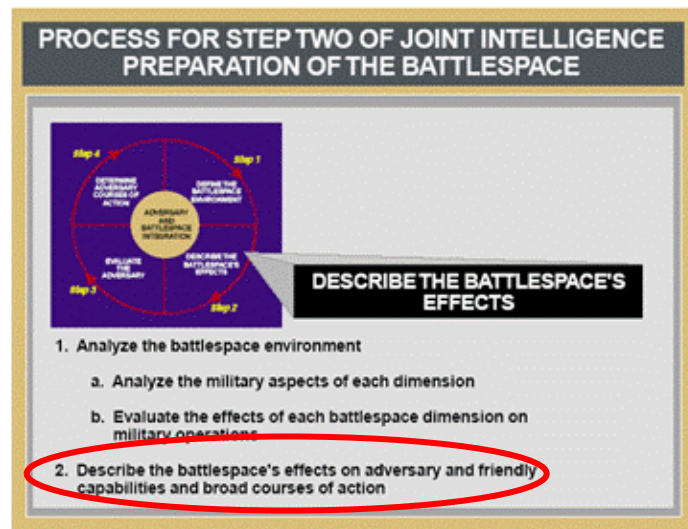


Figure 14-Joint Publication 2-03.1 Step Two of JIPB<sup>90</sup>

Highlighted in Figure 14 is the sub-step where the author believes the cultural dimension should be integrated into Step two of the JIPB. Traditionally a Modified Combined Obstacle Overlay (MCOO) is produced that graphically depicts the battlefield dimensions. Human terrain

<sup>89</sup> James A. Gordon, *Cultural Assessments and Campaign Planning*, (Fort Leavenworth, KS: School of Advanced Military Studies, 2004), 36.

<sup>90</sup> USCJCS, Joint Publication 2-03.1, II-9.

is best depicted using a systems approach as depicted in [Figure 11](#). The author does acknowledge maps can depict human terrain, but their flat, non-descript nature limits their use. As opposed to a systems approach which depicts critical links, nodes and key vulnerabilities within a given culture. Getting the system perfect the first time may not be realistic. Learning and adapting is a better approach, which requires command impetus and involvement. If the commander is comfortable a trusted-agent (small group of key staff members) brainstorming session is a sound approach. Again, asking the right questions is crucial.

Next, the staff should compare what is known with what has worked previously, and finally, compare it with what did not work. Herein, lays the essential element of cultural competence. Understanding and identifying the cultural levers is imperative. This can best be done by incorporating the tool depicted in [Figure 8](#) (Cultural Comparison Scale), which provides a way of analytically representing the interplay of cultures and identifying the critical cultural factors. Critical cultural factors are those cultural factors that can be leveraged to significantly impact the outcome of the campaign. In the subsequent step we will discuss elements of campaign design as they apply to culture. At this point in the JIPB process the planning team and the commander should have developed a deeper level of cultural competence, equipping them to identify COGs, critical vulnerability, capabilities and resources. Sub-step two should be modified to include not only the adversary and friendly, but all the other associated actors. No change to naming convention is recommended for step two.



## Evaluating the Adversary

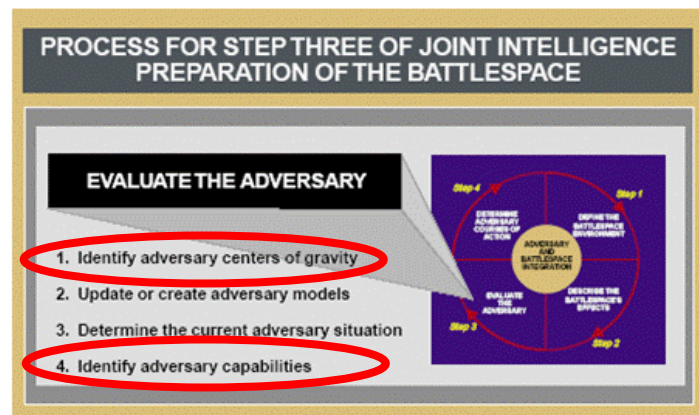


Figure 15-Joint Publication 2-03.1 Step Three of JIPB<sup>91</sup>

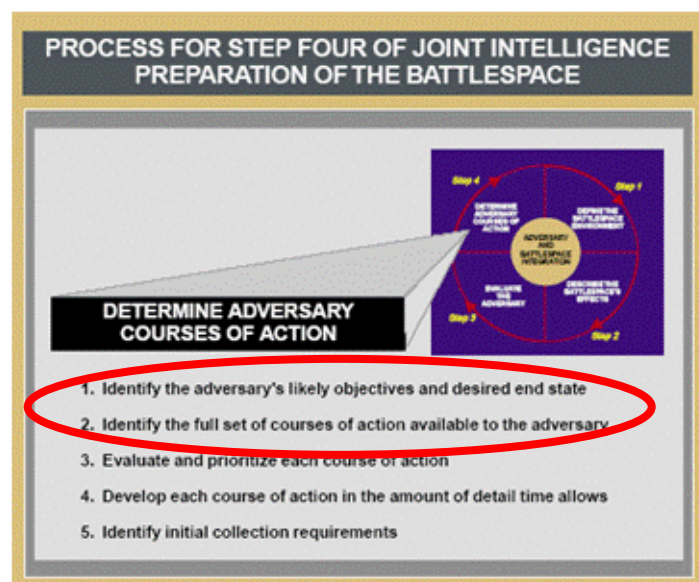
Identifying the COGs and capabilities should be thoughtfully considered despite the time the staff has invested in understanding the various actors systems. Developing the various actors COGs and capabilities will require a further investment of time, so it is recommended the Chief of Staff and/or Chiefs of Plans allocate more time in the planning process. The payoff is a holistic appreciation of every element of the human dimension. Furthermore, unintended consequences and 2d and 3d order effects should receive adequate analysis. The recommended change to the naming convention of step three is *Evaluate the Actors*, which implies a more holistic analysis than currently reflected. The planners are now ready to move on to the fourth and final step of the process.

A cultural center of gravity analysis might be a physical location or cognitive. For instance, Najaf Imam Ali Mosque and the cities Shiite cemetery hold extraordinary cultural/religious significant to Iraq's Shiite's. The same could be said for Mecca's Holy Mosque or Madinah's Prophets Mosque, the Hindu temples in Varansi, Rome's Vatican or Buddhist holy sites at Lumbini, Kusinari, Isipatana or Buddha Gaya. Cognitive cultural COGs might include desecration of the image of the Prophet Mohammad, Jesus, Ali and/or Hussein. It should be

<sup>91</sup> Ibid, II-45.

understood not every situation has a cultural center of gravity; however, those that do should receive appropriate attention. Understanding the capabilities or rather significance attached to a cultural center of gravity should receive equal analysis. A significant analysis reveals the triggers that can cause a culturally sensitive situation to erupt and will aid planners in the next step of the process

## Determining Adversary Courses of Action



**Figure 16-Joint Publication 2-03.1 Step Four of JIPB<sup>92</sup>**

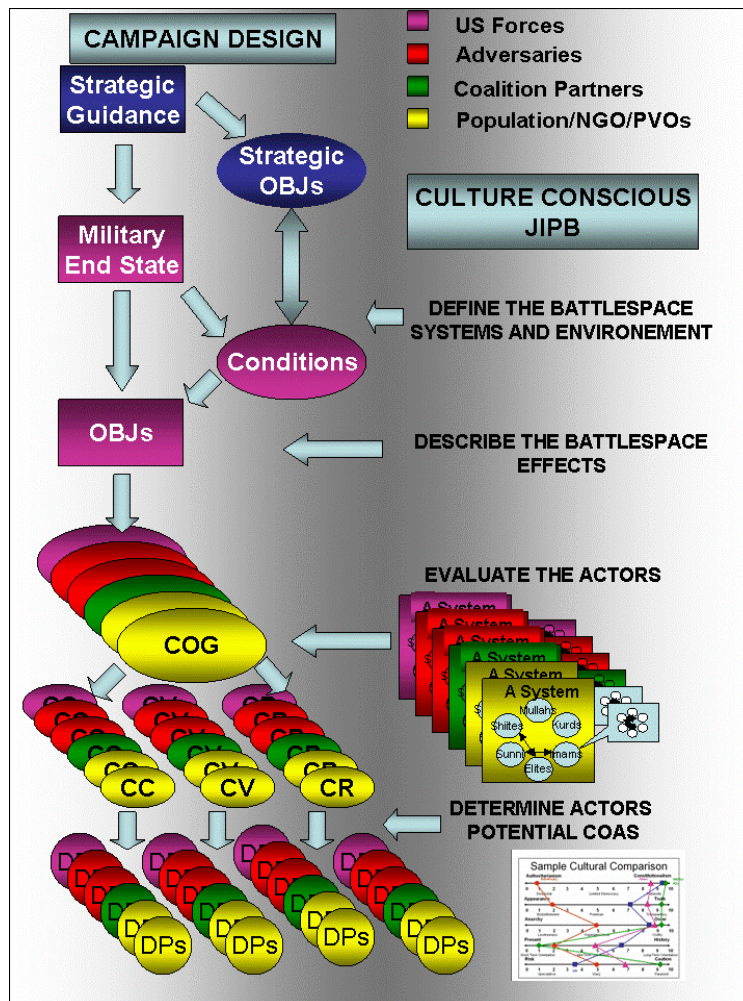
The final step in the JIPB process brings all the elements together. Joint Publication 2-03.1 asserts “the fourth step of the JIPB process seeks to go beyond the battlespace awareness achieved during the previous steps in order to help the JFC attain battlespace knowledge.”<sup>93</sup> This author submits cultural competence and battlespace knowledge are corresponding terms. Both demand the JFC and/or component commanders and their staffs achieve a high degree of situational awareness and integrate cultural competence into the development of courses of action. A course of action that integrates the cultures of all relevant actors reduces the possibility

<sup>92</sup> Ibid, II-45.

<sup>93</sup> Ibid, II-53.

of unintended consequences. Figure 17 integrates and brings together each actors end state, objectives, COG, critical vulnerabilities and critical capabilities into a culturally conscious methodology of campaign design. Ultimately each element of campaign design should be assessed; this is done to ensure the COA the staff war games achieves cultural understanding. But the planners must remember this is an ongoing process that demands constant education.

Each actor's courses of action will change over time, making it necessary to continually update and revisit each actors COA in a lengthy campaign. Their capabilities and their COG may change. An asymmetrical environment is fluid and demands continuous monitoring and adaptation. However, understanding cultural COGs, capabilities and COAs makes it possible to get ahead of the actor and thwart their efforts to unhinge the JFCs campaign plan. Until now, culture has been viewed as benign. This author suggests it is anything but benign. Our own enemies have assessed our political will, which is inexorably tied to the United States ability to endure casualties or long campaigns. They focus their information operations, psychological operations and offensive operations against our culture. Why should we not leverage their culture against them, albeit within the laws of land warfare?



**Figure 17-Integrating a Culture Conscious Approach into Campaign Design (Created by Author)**

Figure 18, is again borrowed from James Gordon's monograph *Cultural Assessments and Campaign Planning* and provides a start point for developing culture-conscious courses of action. In conclusion, the naming convention for step four should be modified from Determine Adversary Courses of Action to *Determine Actors Courses of Action* to reflect the new complexity of the COE.

<ul style="list-style-type: none"> <li>• COA Number and Statement:</li> </ul>
<hr/> <ul style="list-style-type: none"> <li>• Likely Group __ reactions. Include the dominant cultural element(s) that contribute to each reaction.             <ol style="list-style-type: none"> <li>1)</li> <li>2)</li> <li>3)</li> <li>4)</li> </ol> </li> </ul>
<ul style="list-style-type: none"> <li>• If unacceptable, what are acceptable alternatives that achieve the stated endstate and fit the cultural circumstances?</li> </ul>

**Figure 18-Gordon's COA Cultural Assessment Worksheet<sup>94</sup>**

## Summary

Joint Intelligence Preparation of the Battlespace fails to take into account US military culture, our coalition partner's culture and their political limitations; the culture of our adversaries, non-combatants and the local population. As Congressman Ike Skelton elucidated at the beginning of this monograph, it was a lack of cultural awareness that contributed to a campaign that did not adequately take into account the difficulties of post-war reconstruction. This discourse was written to address the cultural and social concerns Congressman Skelton's comments identified. As such, this section has made recommended changes to the JIPB process and incorporates the complexities of the post-Cold War world.

Each step of the JIPB process has been modified to integrate cultural understanding, employing a systems and systemic approach. Cultural awareness falls well short of competence. Operational commanders cannot afford operate at a cultural disadvantage. He must understand each of the actor's intentions, capabilities and vulnerabilities and how their agendas affect his campaign plan. Subsequently, this monograph has recommended changes to the naming convention of the JIPB process as reflected by Figure 18.

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<sup>94</sup> Gordon, Cultural Assessment and Campaign Planning, 37.

Proposed Change to JIPB	
Current Steps to JIPB	Proposed Change to JIPB
Define the Battlespace Environment	Define the Battlespace Systems & Environment
Describe the Battlespace Effects	No Change
Evaluate the Adversary	Evaluate the Actors
Determine Adversary Courses of Action	Determine Actors Courses of Action

**Figure 19-Recommended Changes to the Step to Joint Intelligence Preparation of the Battlespace (Created by Author)**

Alternately, this monograph has submitted a series of questions to help operational commanders and planners assess the geographics, population demographics, political and socioeconomic factors, infrastructure and information, environmental considerations and the psychology of decision makers. Furthermore, this monograph has suggested a systems approach and a learning environment in order to holistically define the battlefield effect. This monograph has suggested naming convention changes for three of the four steps of JIPB. Figure 19 depicts the recommended changes to the naming convention of JIPB. Structurally, this monograph has recommended incorporating the PMESII model depicted in Figure 11 into step two, Define the Battlefield Effect. Constantly updating and synthesizing the results of the PMESII model facilitates determining the actors COGs, critical vulnerabilities, capabilities and resources in step three. Finally, cultural competence informs step four of the process analytically laying down each actor's *critical cultural factors* side-by-side in a comparative analysis and developing each actors COA. In conclusion, culture cannot wait to inform the planning process after the campaign has begun. It must complement the planning throughout every step.

## **Recommendation and Conclusion--Weaponized Culture**

Understanding the values, beliefs, modes of thinking and meaning are integral to understanding the nature of human conflict. Therefore, culture is arguably intrinsic to campaign design. As discussed in the section entitled “Changes in the Operational Environment”, the world has become exceedingly complex, chaotic and interconnected since the end of the Cold War. The end of a bifurcated world has left the world with a host of seemingly irrational actors much like Iran. But, the US cannot always react to threats to its interests kinetically. Obtaining consensus on kinetic warfare is internationally more difficult, which makes the search for potent, non-lethal options a necessity. Even before major combat operations and the stability phase begin, US military planners must integrate culture into campaign design. Additionally, the US cannot afford anything less than the highest level of cultural understanding. There is much work that remains to be done in this field of study. That being said, the potential exists to leverage culture to coerce or preempt, which may contribute to defeat of an adversaries designs and avoid senseless casualties.

In other words, culture has the potential to be weaponized. What does it mean to weaponize culture? To weaponize is to make into or use as a weapon or a potential weapon. Weaponizing culture is employing culture as an instrument of attack or defense in warfare. To operationally weaponize culture, planners must discover using cultural competence the levers or tensions within a culture that can be manipulated. Examples of how the US or its allies have employed this concept in a contemporary context are not available. Therefore, in the subsequent paragraphs, this monograph will submit two contemporary and one ancient historical example for consideration. However, it is essential to understand that weaponizing culture has in most cases been accidental rather than purposeful. That is why it is important to provide a historical context for its potential.

The first example is derived from the 1967 Arab-Israeli War. Israel launched a surprise air attack on Egyptian airfields in June 1967. The initial Israeli attack destroyed 75 percent of

Egypt's airfield on the ground in the initial assault. Despite the implications, Marshall Abdel Hakim Amer, Chief of the Egyptian General Staff, sent a message to General Riad on the Jordanian front that contradicted the reality. His report according to Raphael Patai, meant to save face, reported 75% of the Israeli Air Force had been put out of action and Egyptian troops in the Negev were on the offensive. Therefore, he ordered General Riad to open a second front and launch an offensive.<sup>95</sup> Marshall Amer's orders were in direct contradiction to the truth and meant certain destruction for General Riad's force.

The similarity of the report offered by the Iraqi Minister of Information, affectionately known as Baghdad Bob, in Baghdad 2003 has a striking similarity. While his reports seemed ludicrous to American viewers who knew the truth, he reported Iraqi troops had retaken Saddam International and swept the whole area clean of American forces. To the culturally uniformed this was a bold face lie, but to an Arab they represented a means of saving face. Again Patai tell us "In every conflict those involved tend to feel that their honor is at stake, and that to give in, even a little as an inch, would diminish their self-respect and dignity".<sup>96</sup> Both Nasser and Saddam's lies go to the heart of this issue. At a much deeper level their self-respect and dignity framed their understanding of power. To appear weak would have allowed their enemies to profit, despite the reality.

Historical examples of weaponizing culture are nothing new, although certainly few have realized their potential. Yet some commanders did realize cultures potential. Hannibal Barca, son of Hannicar Barca of Carthage, entered the Roman homeland in 219 B.C and ravaged its armies by prosecuted a calculatingly culture-centric campaign. Hannibal could not have achieved such overwhelming results had he not first and foremost been a master of battlefield tactics. Donald Kagan states regarding Hannibal: "He was a master of the tactics of combining infantry

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<sup>95</sup> Raphael Patai, *The Arab Mind*, 108-109.

<sup>96</sup> *Ibid*, 241.



with cavalry, and even war elephants, to permit maneuver that often led to the surroundings and annihilation of the enemy. He was a natural leader who could command the allegiance even of mercenary troops and allies in the most difficult times”.<sup>97</sup> Hannibal was motivated by the humiliation and financial hardship the Romans had placed on Carthage in 238 B.C. after the First Punic War. Hannibal’s objective was to humiliate Rome by invasion and persuade its tenuous allies to join his ranks, leaving Rome powerless and vulnerable and restore the primacy of Carthage.

The Roman difficulty stemmed from there command structure. Fearful of dictator’s intent on capturing the loyalty of the army, Senators were elected to lead the army in the field for a campaign season and served at the good pleasure of the representatives of the people. Hannibal understood this political and military cultural characteristic of the Romans and leveraged it against them. Author G.P. Baker in his seminal work, *Hannibal*, showcases Hannibal’s ability to weaponize culture. Baker relates, Hannibal “saw so clearly the right course for the Romans to adopt, that he scarcely dared to hope for the success of the plan which he now put into operation. He intended to try to *exploit the mood* of Longus [the serving proconsul], and to force a general engagement”.<sup>98</sup> The ensuing battle of Trebia put the Roman Army to flight with minimal casualties to Hannibal’s force. Hannibal repeated this scenario again and again on battlefields across Rome. At Lake Trasumennus Hannibal killed 15,000 Romans, captured another 15,000 and destroyed a 4,000 strong cavalry unit sent to relieve Flamius’ army. Hannibal knowingly created a state of panic in the Roman Senate and understood the expediency of the moment would cause them to act in haste to deal with the emergency, causing them to be blinded to the cultural consequences.

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<sup>97</sup> Donald Kagan, *On the Origins of War and the Preservation of Peace*, (New York: Doubleday, 1995), 260.

<sup>98</sup> G.P. Baker, *Hannibal* (New York: Cooper Square Press, 1999), 89.

Senator Quintus Fabius rallied the Senate and the people of Rome with a combination of religious observances and a scorched earth strategy, meant to deprive Hannibal of subsistence through “a war of exhaustion”.<sup>99</sup> Flamius’ strategy frustrated the army, his offensive-minded Master of the Horse (second-in-command) and the Senate, despite limited successes. Parker relates: “The difficulty was that Hannibal was presenting the Romans with a genuine dilemma; they had to choose the least of two evils”.<sup>100</sup> Hannibal understood the political constraints, the Roman consul’s time constraint and later determined through spies the open dissention between Flamius and Minucius, the Master of the Horse.

Forced to await political events, Hannibal survived afield while the Roman Senate and the Populares squabbled, ultimately electing plebian and patrician consuls Terentius Varro and Lucius Paulus to serve as co-proconsuls. The plebians espoused mass and the patricians advocated “brains would outwit numbers”. The majority of the Senate adopted a strategy of safety in overwhelming numbers. A fallacious course of action, but one they believed the quickest way to rid Rome of Hannibal. Ultimately Roman arrogance, exactly what Hannibal was counting on lead to the destruction of Varro’s and Paulus’ seven legions at Cannae. Hannibal understood the critical cultural element that he needed to exploit and he employed it as judiciously as he did his kinetic capability. He weaponized the Romans own culture against them, particularly their imperial pride and political need for immediate results.

A more modern example of weaponizing culture is taken from an oral history account that comes from Operation Enduring Freedom (OEF). According to a School of Advanced Military Studies (SAMS) speaker, a Special Forces Operational “A” Detachment (SF ODA) and its Afghan allies were attempting to force the surrender of a certain Taliban force. Circling above the battlefield was a B-52 Stratofortress prepared to drop bombs on the belligerents if they failed

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<sup>99</sup> Baker, *Hannibal*, 102, 107-110.

<sup>100</sup> Ibid, 113.

to surrender. In a classic case of irony, the pilot was a woman. It is important here to remind the reader of the role of women in Muslim culture. To be killed by a woman is culturally reprehensible to a man's sense of honor. Women are viewed as inferior to men, both morally and physically weak. While the SF ODAs air combat controller (ACC) was talking to the circling Stratofortress the Afghan interpreter recognized a woman's voice and asked if the pilot's voice could be broadcast to the encircled Taliban.

The AAC turned up the speaker on his radio loud enough when projected through his loudspeaker the Taliban could clearly make out the gender of the pilot circling above. Taking full advantage of the local culture, the interpreter told the Taliban the Americans despised them so much that they had sent their women to kill them. The interpreter then offered the Taliban one last chance to surrender before the bombs pulverized them. Based on eye witness reports the Taliban surrendered in mass to avoid death at the hands of an American woman. Certainly, the demonstration of American airpower earlier in the campaign convinced the Taliban the US possessed this capability and understood its lethality. Therefore, the conclusion we can draw from these examples, is that ability, plus an unequivocal demonstration of supremacy, plus a vulnerable cultural lever, in the hands of a competent commander and his staff, has the potential to achieve the desired effect.

Using the above formula, US campaign designers can potentially craft campaign plans that leverage the non-kinetic effect of culture. Instead of accidentally leveraging culture, examples like these provided could become intentional, as opposed to accidental. In all three of these cases, honor was more important than truth or life. Whether we call it pride, ego, machismo or face, what it represents is clearly a fulcrum from which planners can manipulate our adversaries. The starting point is cultural competence and cultural competence demands the investment of time and focused study. Finally, culture cannot be weaponized without certain risk. Returning to the very first example of weaponized culture, when Nassar knew he was defeated

and the Jordanians offensive had been thwarted, Nasser sent Hussein a communiqué recommending they blame their battlefield failure on US and British intervention. Raphael Patai relates: “Nasser in a telephone conversation with King Hussein suggested that a communiqué be issued by the Jordanians, as well as by the Syrians, to the effect that American and British aircraft were collaborating with Israel and attacking Egypt from their aircraft carriers. This at the time seemed a perfect plan to save face.”<sup>101</sup>

Although eventually the Arab forces admitted their joint failure, the lesson remains, if planners decided to weaponize culture, their wargame must take into account the 2d and 3d order effects and/or unintended consequences. Culture has an array of battlefield applications, which will not be described here. Suffice it to say culture has specific application in information operations, deception operations, feints and demonstrations.

Therefore, this monograph recommends, in addition to the proposed changes to the JIPB as indicated above in Figure 19, an operational investment in carefully vetted cultural intelligence capital, language training, and specialized education; exploited by full emersion in *non-integrating gap* or *seam* regions of the world. Operational commanders cannot afford to presume the Regional Combatant Commander’s, Standing Joint Force Headquarters will provide PMESII experts during crisis action planning or campaign planning. Fort Leavenworth’s Red Team University may provide commanders a means to train resident cultural experts academically. Commanders should recognize the limitation of this program is a lack of language training and total emersion. What may prove to be the undoing of this venture are the commanders themselves, if the joint community fails to educate them to the true potential of Red Teaming. Red Teamers cannot become invested in the plan, but remain outside the process. However, they cannot be adversarial else the potential they represent will be dissipated.

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<sup>101</sup> Ibid, 110.

Second, the joint community should integrate culture into the doctrine of campaign design and invest in developing culturally competent subject matter experts within the staff. The Marine Corps University has undertaken an ambitious program of instruction designed to teach cultural awareness to their Marines. The joint community should leverage their curriculum and take it one step further. Based on a soldier, sailor, airman or Marines rank and responsibility he or she should be trained at the appropriate cultural level (see [Figure 1](#)). Furthermore, a broad overarching program should be introduced within the joint force to instruct leaders and key staff members how to identify cultural leverage points.

There is no cookie cutter solution to operationalizing culture. Every situation and circumstance will be different. Therefore it is important we train ourselves to make a personal study of culture, because one never knows when the opportunity might arise to save lives by leveraging culture. In the interim, integrating cultural competence into JIPB and throughout the campaign design process can only be achieved by applying a systems approach and a systemic design to campaign planning. Why? Because **culture has become the new key terrain in the post-Cold War era, which demands a systems approach to analyze and integrate culture into the Joint Task Force (JTF) Commander's campaign planning process.** Applying a systems approach provides a holistic understanding of all the actors as systems with critical vulnerabilities, capabilities, resources and centers of gravity. By applying this approach throughout the campaign planning process, operational planners can unlock the keys of a culture and reveal the leverage points that can contribute to rapid defeat and potentially facilitate democratic reform in unstable regions of the world.

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